UK Organic Market Overview

Kantar 52 wks w/e 6 Sept 2020

9/11/2020

BORD BIA
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Market Value : UK

Organic Produce growing ahead of Total Grocery in UK

Total Organic: Inc. Supermarket Retail, Foodservice, Home Delivery, Independent Retail, Deli and Convenience

2020 €2.45b
+4.5% Sales Growth

Non organic food and drink sales growing at 3.2%

Source: Nielsen 2020 & Soil Association October 2020

UK Organic Sector Breakdown
Kantar 52 Wk W/E 060920

	Vegetables	Dairy	Fruit	Meat	Poultry (inc. Hen)	Fish	Ambient	Total
Series1	182.5	333.1	117.2	65.5	83.7	8.2	356.8	1147

Source: Kantar 52 wk W/E 06/09, Soil Association 10/20 , Nielsen 2020

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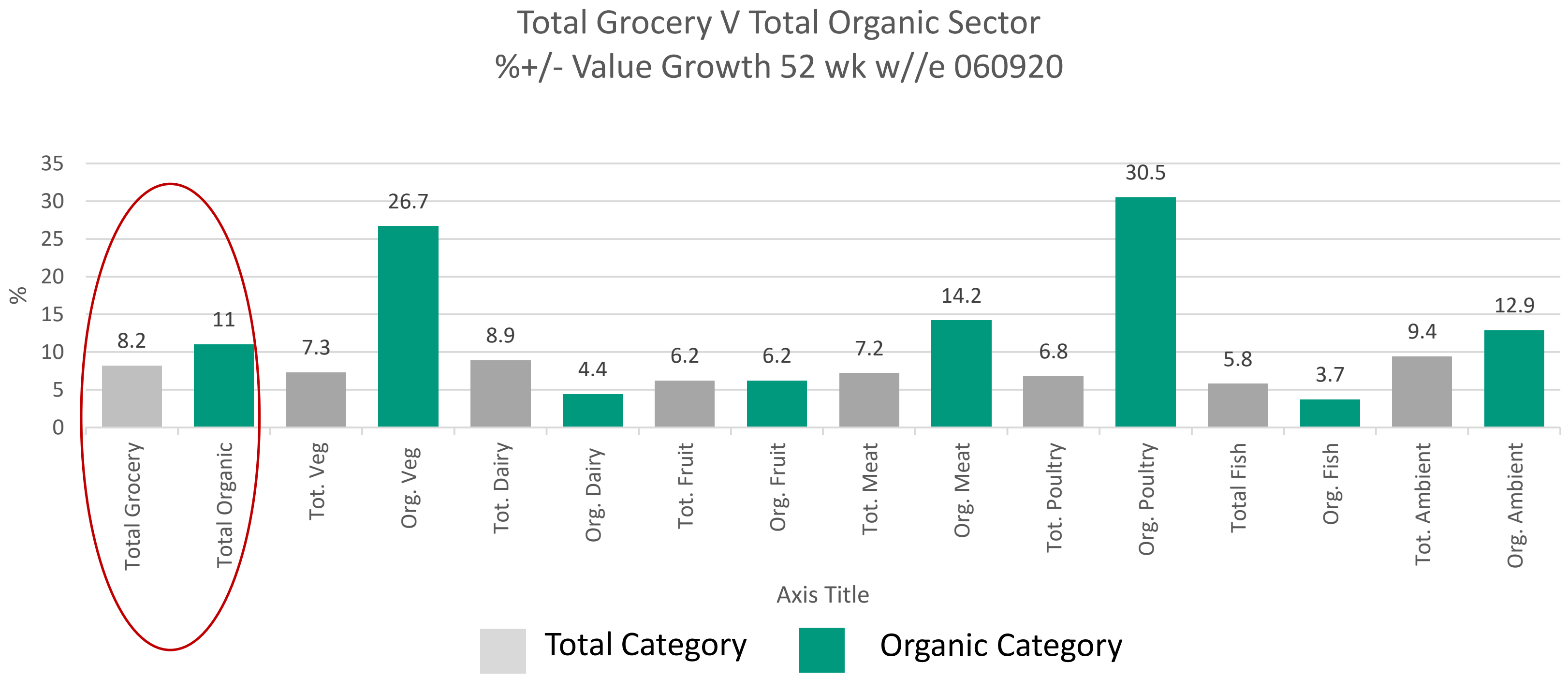
Total Value Grocery v Total Value Organic

Total Organic growing ahead of Total Grocery.
Organic delivering higher growth in Vegetables, Meat, Poultry and Ambient.



Strong Organic Category Performance: Additional £110.2m into category.





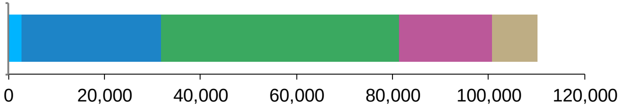


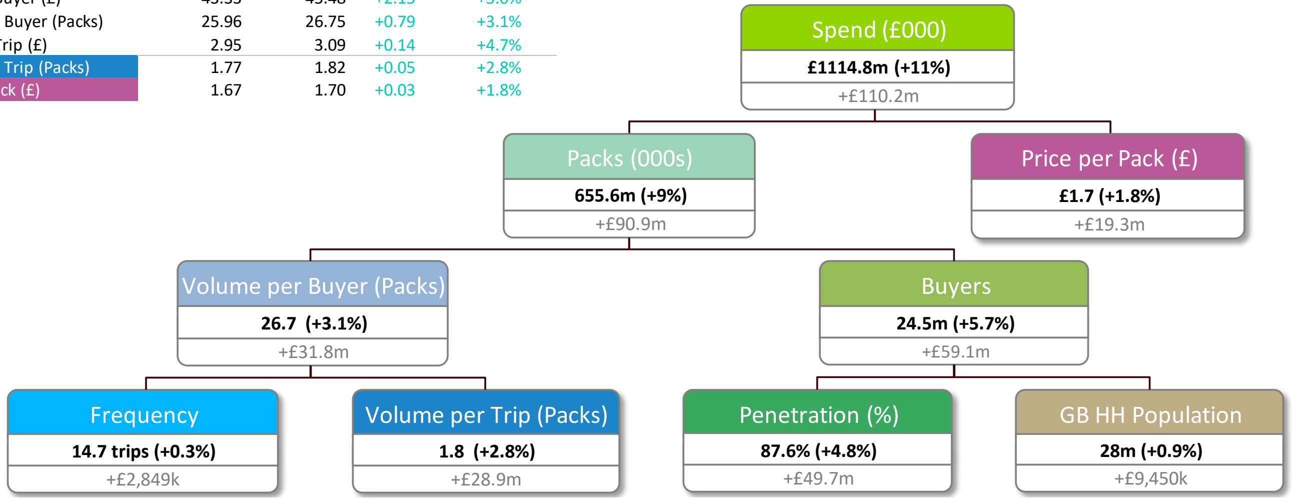
	Vegetables	Dairy	Fruit	Meat	Poultry (inc. Hen)	Fish	Ambient
Value	£182m	£333m	£117m	£65m	£83m	£8m	£356m
Share of Fresh Organic							
+/-% Change Growth	26.7%	4.4%	6.2%	14.2%	30.5%	3.7%	12.9%
Drivers	**New Shoppers**	**New Shoppers Average Price Increase**	**New Shoppers Average Price Increase**	**New Shoppers Average Price Increase**	**New Shoppers**	**Frequency**	**New Shoppers**
Top Retailer Share Value	**Waitrose**	**Sainsbury**	**Tesco**	**Sainsbury**	**Waitrose**	**Waitrose**	**Waitrose**

The Total Organic market value is +£1.1b increasing 11% year on year. Growth driven predominately through new shoppers but there has also been an increase in average price and larger volume per basket per trip.

Measure	52 w/e 08 Sep 19	52 w/e 06 Sep 20	Change (Actual)	Change (%)
Spend (£000)	1,004,625	1,114,779	+110,154	+11.0%
Packs (000s)	601,782	655,642	+53,860	+9.0%
Penetration (%)	83.59	87.57	+3.99	+4.8%
Frequency	14.69	14.73	+0.04	+0.3%
Spend per Buyer (£)	43.33	45.48	+2.15	+5.0%
Volume per Buyer (Packs)	25.96	26.75	+0.79	+3.1%
Spend per Trip (£)	2.95	3.09	+0.14	+4.7%
Volume per Trip (Packs)	1.77	1.82	+0.05	+2.8%
Price per Pack (£)	1.67	1.70	+0.03	+1.8%

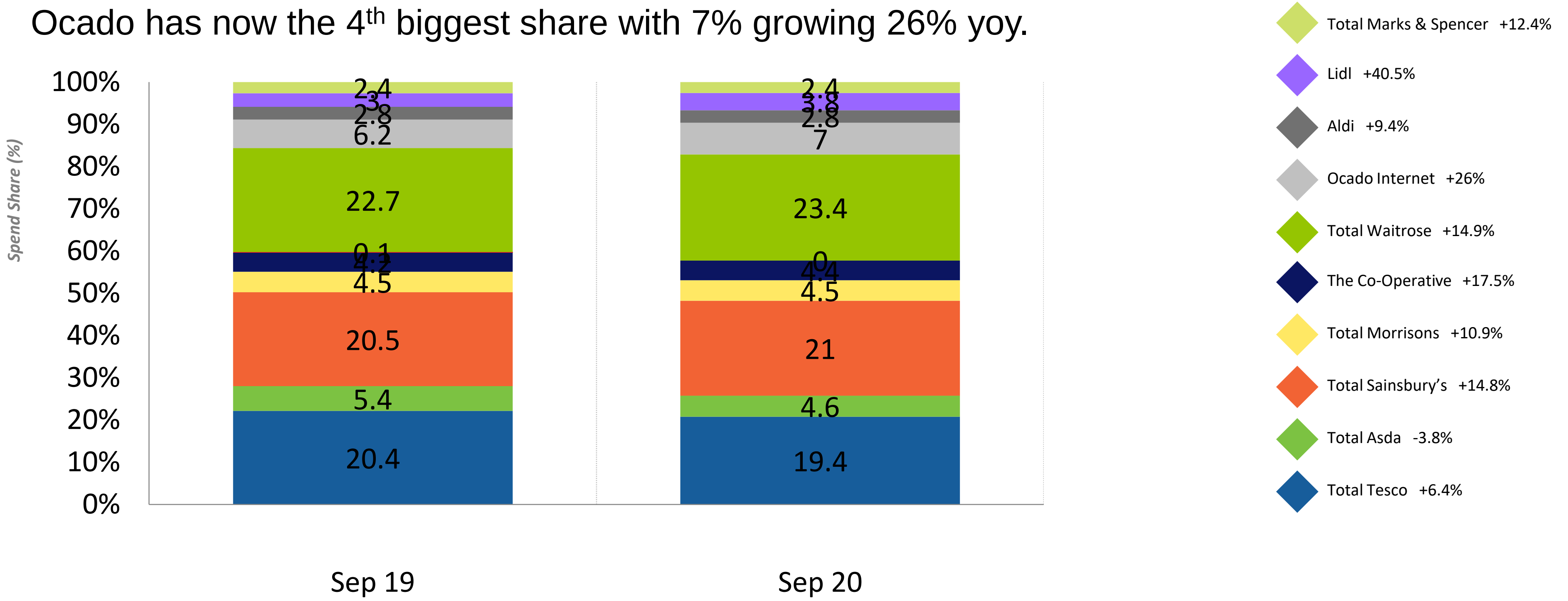
Value up 11% worth £110.2m





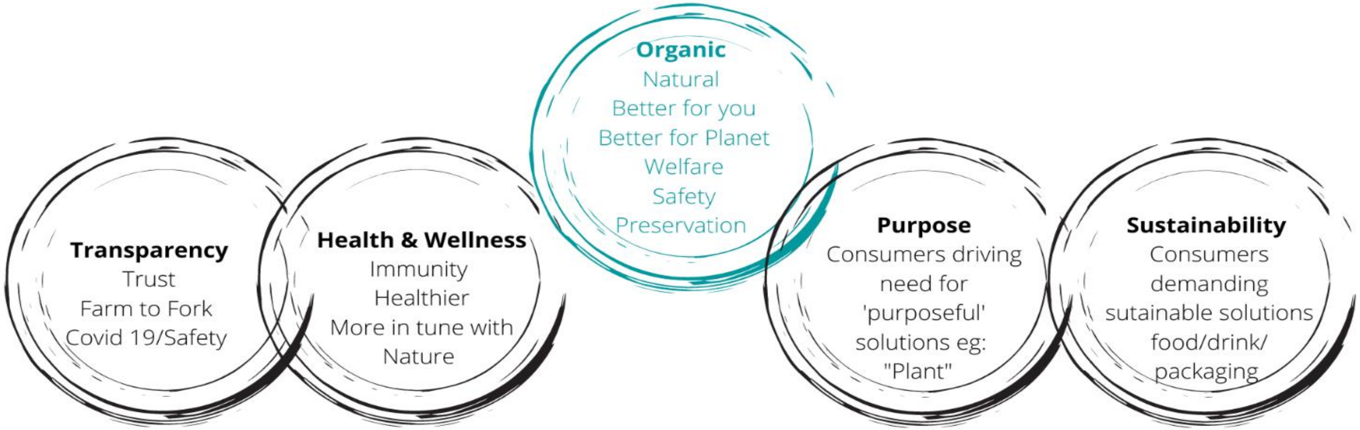
Total Organic – Retailer Shares and Growth
Waitrose, Sainsbury and Tesco remain dominant and command 64%share of market.

Ocado has now the 4th biggest share with 7% growing 26% yoy.



UK Insights

The Organic Sector continues to deliver on evolving Consumer Needs



- The Organic market drove more sales then non organic during the early months of the Covid 19 pandemic.
    - UK Kantar 18.7% increase in sales v 14.2% of non organic equivalents 12 wks end of May.

The Growth of Organic Online

As consumers consistently embrace online shopping within Grocery Retail we see Ocado has now the **4th biggest Retailer share in Organic with 7.1% market share and growing 26 % year on year.**

Organic box schemes delivery have grown in value by 11.2% in 2019.

Ocado holds 4,500 Organic lines and have seen a 12% increase in sales in 2019.

Kantar Breakdown:

- Within **Dairy** Ocado has increased its share from 6.4% to 7.1% by attracting new shoppers and increasing sales by 14.5% sales year on year. Ocada market share in Dairy now ahead of Lidl, Asda, Morrisons within Dairy.
- Within **Fruit** Ocado has increased its market share from 3.5% to 5% increasing sales, a 10% year on year.
- Within **Vegetables** Ocado has increased its market share from 5.6% to 6.9%, a 21.2% increase in sales year on year.
- Within **Meat** Ocado has increased its market share from 9.1% to 10.2% , a 28% increase in sales year on year.

Organic Vegetables

- Organic Vegetables value at £182m is in strong double digit growth of 16.7% driven by new shoppers.

- Organic Vegetables is ahead of Total Vegetable market valued at £5.b and growing at 7.3% . Growth driven by additional volume per trip.

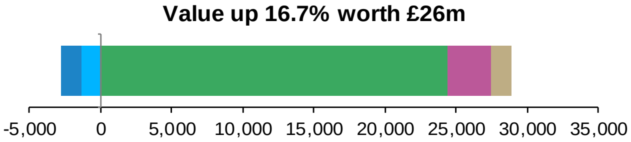
- Waitrose has overtaken Tesco to take top spot in market share and has driven 25.1% sales growth year on year.
- Sainsbury market share just ahead of last year but has increased sales by 16% year on year.
- Tesco has lost substantial market share and is in decline year on year.
- Lidl and Ocado increasing their market share and sales increase of 48.8% and 21.2% respectively.

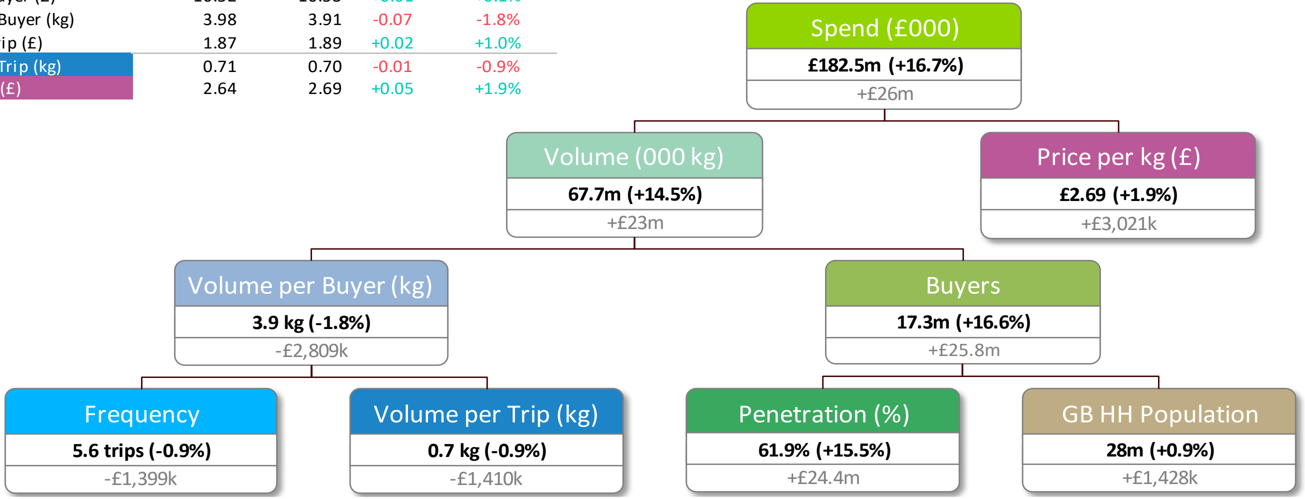
- All Retailers attracting new shoppers into the Organic Vegetables sector with Waitrose, Sainsbury and Lidl seeing strong sales growth year on year.
- Ocado seeing a 21.2% increase in sales year on year.

- Pre-family shoppers driving a large overtrade in Organic Vegetables, the third biggest cohort, holding a 16.8% market share.

Organic vegetables value at £182m is in strong double growth of 16.7% driven by new shoppers.

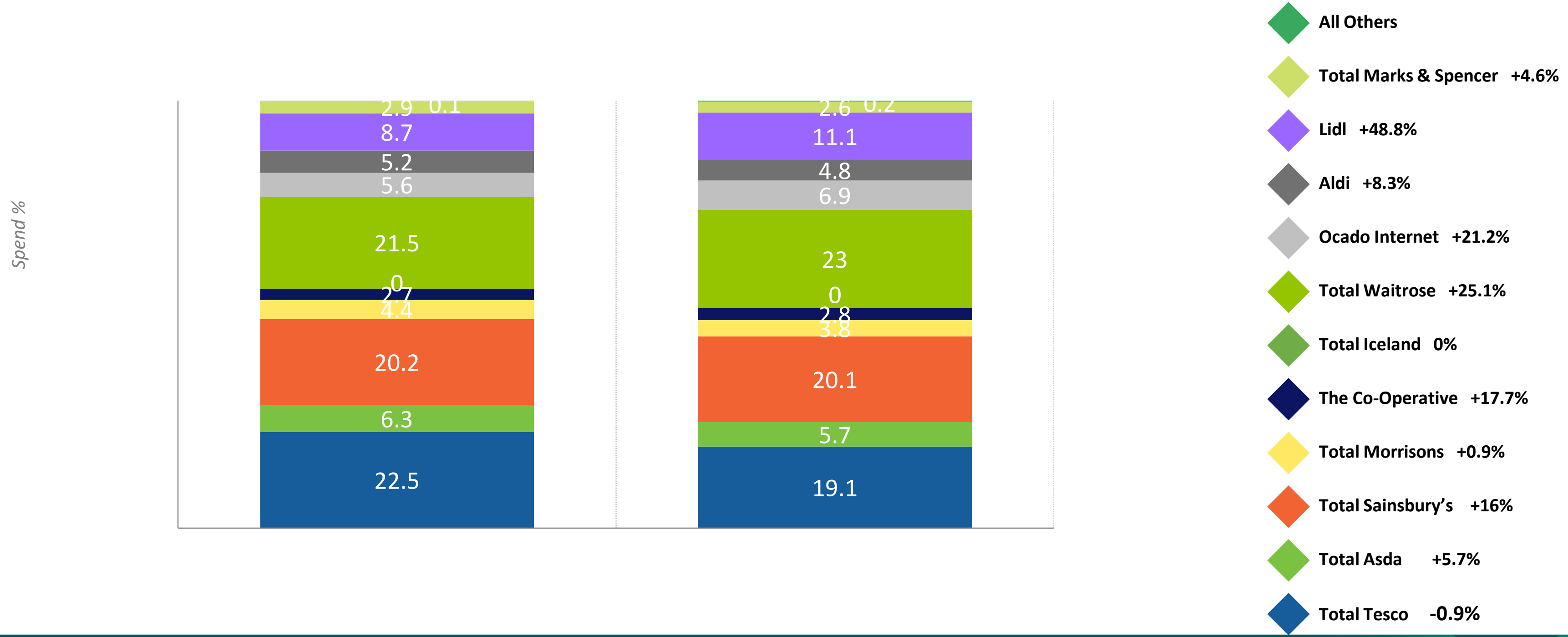
Measure	52 w/e 08 Sep 19	52 w/e 06 Sep 20	Change (Actual)	Change (%)
Spend (£000)	156,426	182,471	+26,045	+16.7%
Volume (000 kg)	59,190	67,745	+8,555	+14.5%
Penetration (%)	53.62	61.93	+8.31	+15.5%
Frequency	5.62	5.57	-0.05	-0.9%
Spend per Buyer (£)	10.52	10.53	+0.01	+0.1%
Volume per Buyer (kg)	3.98	3.91	-0.07	-1.8%
Spend per Trip (£)	1.87	1.89	+0.02	+1.0%
Volume per Trip (kg)	0.71	0.70	-0.01	-0.9%
Price per kg (£)	2.64	2.69	+0.05	+1.9%



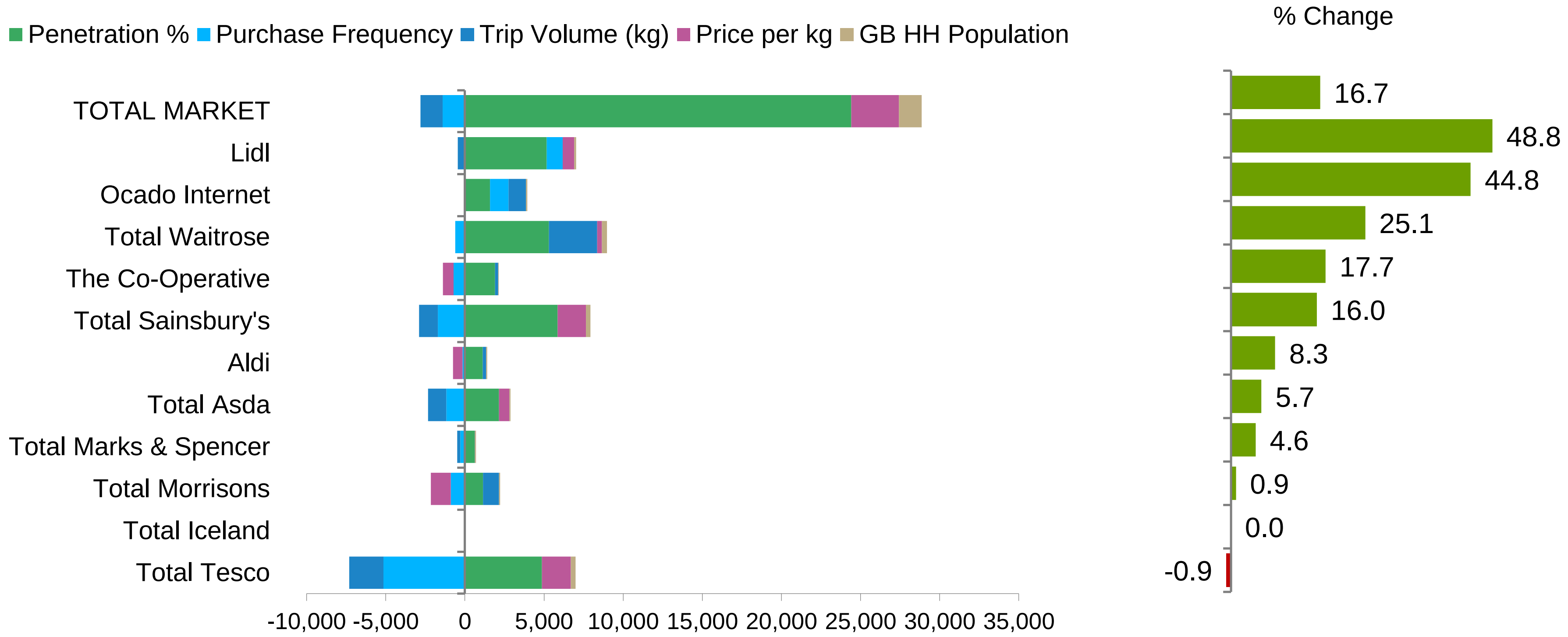


Waitrose has overtaken Tesco to take top spot in market share and has driven +25.1% sales growth year on year.

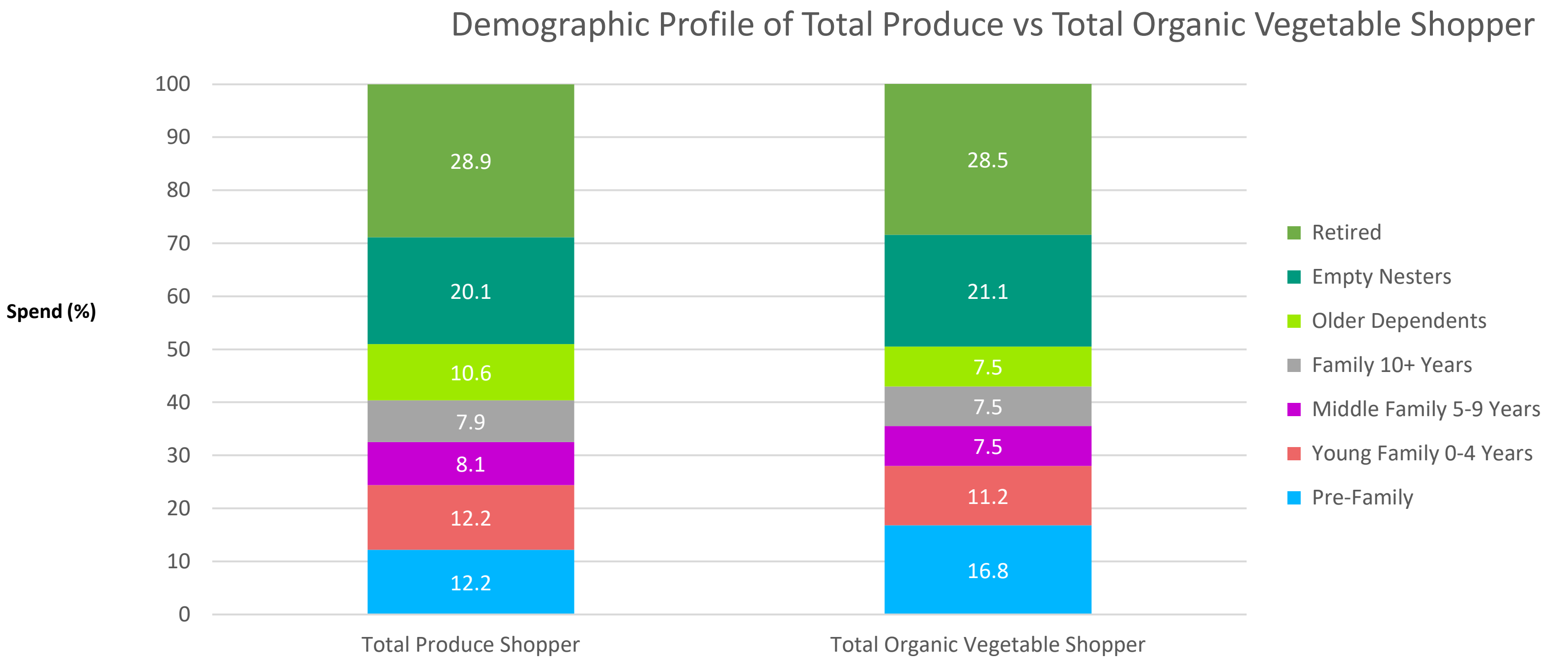
Sainsbury increase sales by +16% year on year. Tesco is in decline year on year.
Lidl and Ocado increasing their market share and sales increase of 48.8% and 21.2% respectively.



All Retailers attracting new shoppers into the Organic Vegetables sector with Waitrose, Sainsbury and Lidl seeing strong sales growth yoy. Ocado seeing a 21.2% increase in sales YOY.



Retired and Empty Nesters account for almost 50% of purchase. Pre-family shoppers driving a large overtrade in Organic Vegetables against Total Produce, the third biggest cohort and holding 16.8% of market share.



Organic Dairy Overview

- Organic Dairy value at +£333 million is growing at 4.4% driven by attracting new shoppers, and higher average price.

- Organic Dairy growth is behind Total Dairy value +£12.2 billion and growing at 8.9%. Total Dairy growth is driven by existing shoppers putting more into their baskets.

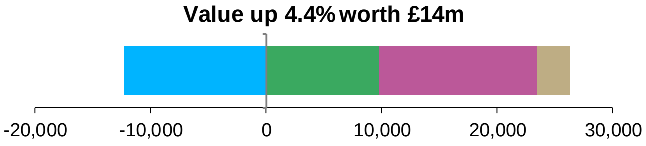
- The top three Organic Dairy Retailers Sainsbury, Waitrose and Tesco in share growth driven by new shoppers and average price increases.

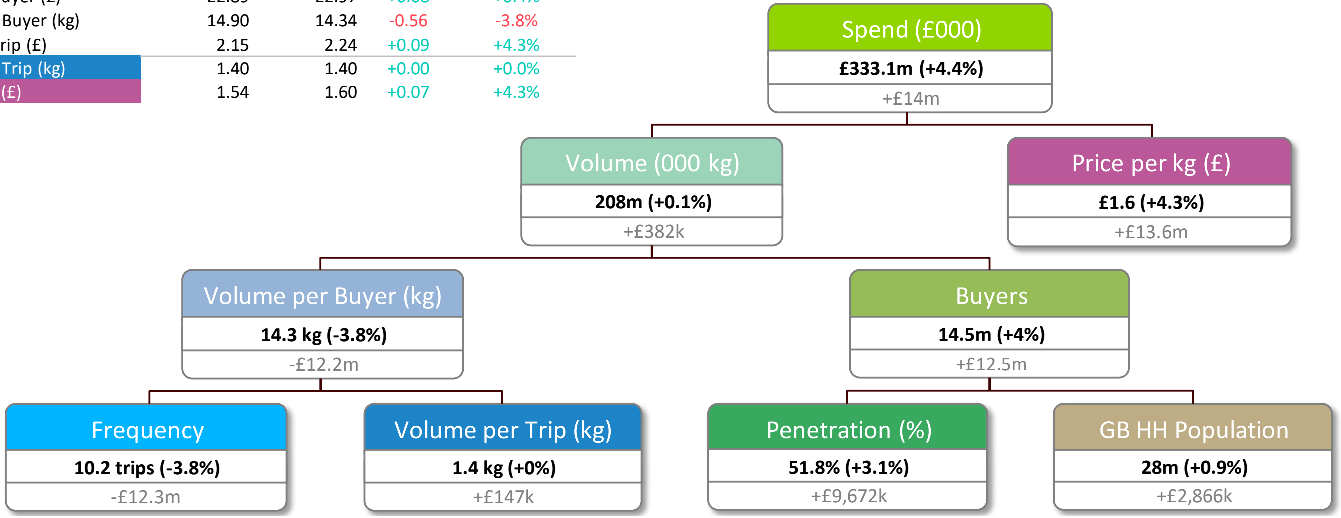
- Ocado has increased its share of the Organic Dairy category by attracting new shoppers achieving a 14.5% sales increase year on year.

- The Organic Dairy shopper tends to be a 2 person household who is retired, empty nesters or pre families who all overtrade within Organic Dairy and account for just under 65% share of this market.

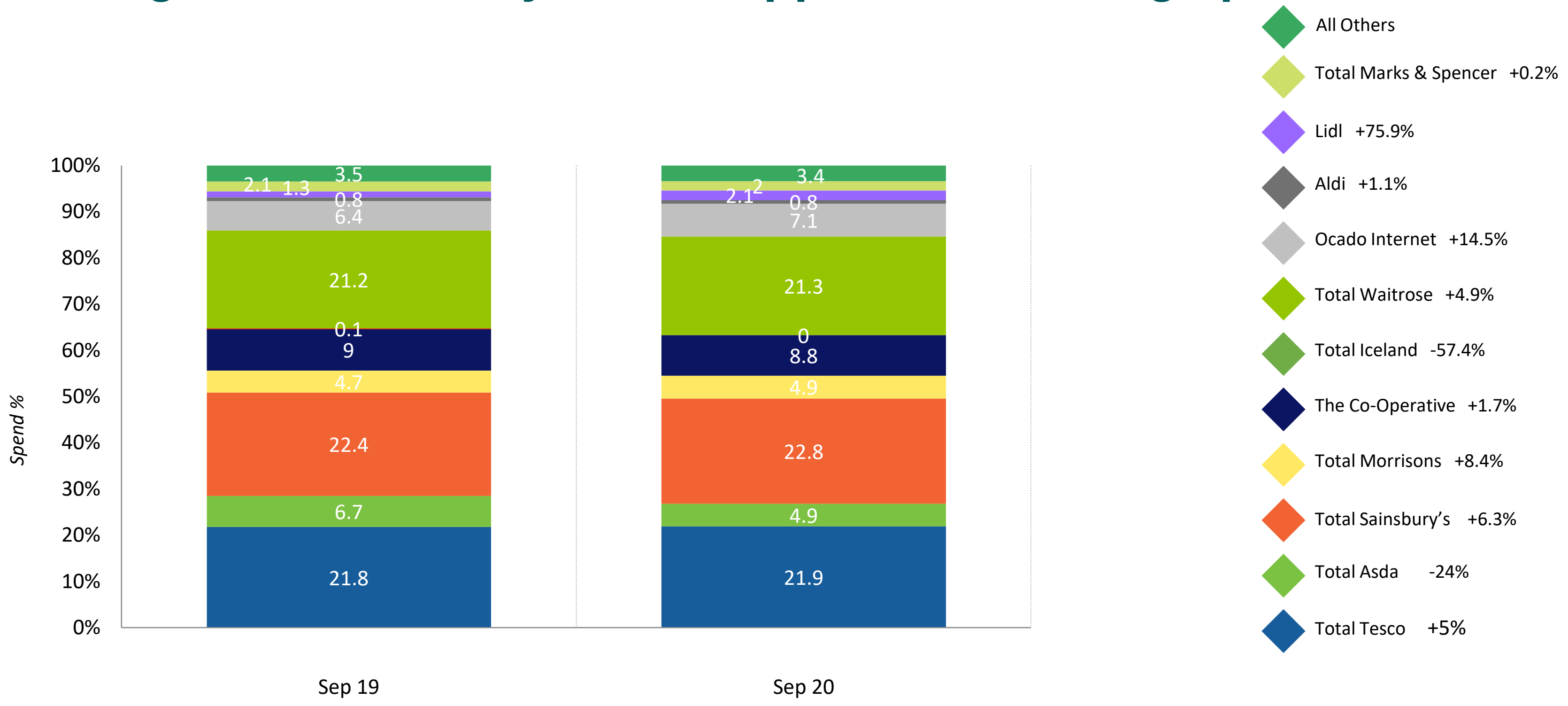
Organic Dairy value at +£333 million growing at 4.4% is driven by attracting new shoppers, and higher average price.

Measure	52 w/e 08 Sep 19	52 w/e 06 Sep 20	Change (Actual)	Change (%)
Spend (£000)	319,162	333,125	+13,963	+4.4%
Volume (000 kg)	207,815	207,967	+152	+0.1%
Penetration (%)	50.28	51.82	+1.54	+3.1%
Frequency	10.64	10.24	-0.41	-3.8%
Spend per Buyer (£)	22.89	22.97	+0.08	+0.4%
Volume per Buyer (kg)	14.90	14.34	-0.56	-3.8%
Spend per Trip (£)	2.15	2.24	+0.09	+4.3%
Volume per Trip (kg)	1.40	1.40	+0.00	+0.0%
Price per kg (£)	1.54	1.60	+0.07	+4.3%





The top three Organic Dairy Retailers Sainsbury, Waitrose and Tesco in share growth driven by new shoppers and average price increases.



Total Dairy exc Eggs | Organic | Retailer Shares | 52 w/e 6th September 2020

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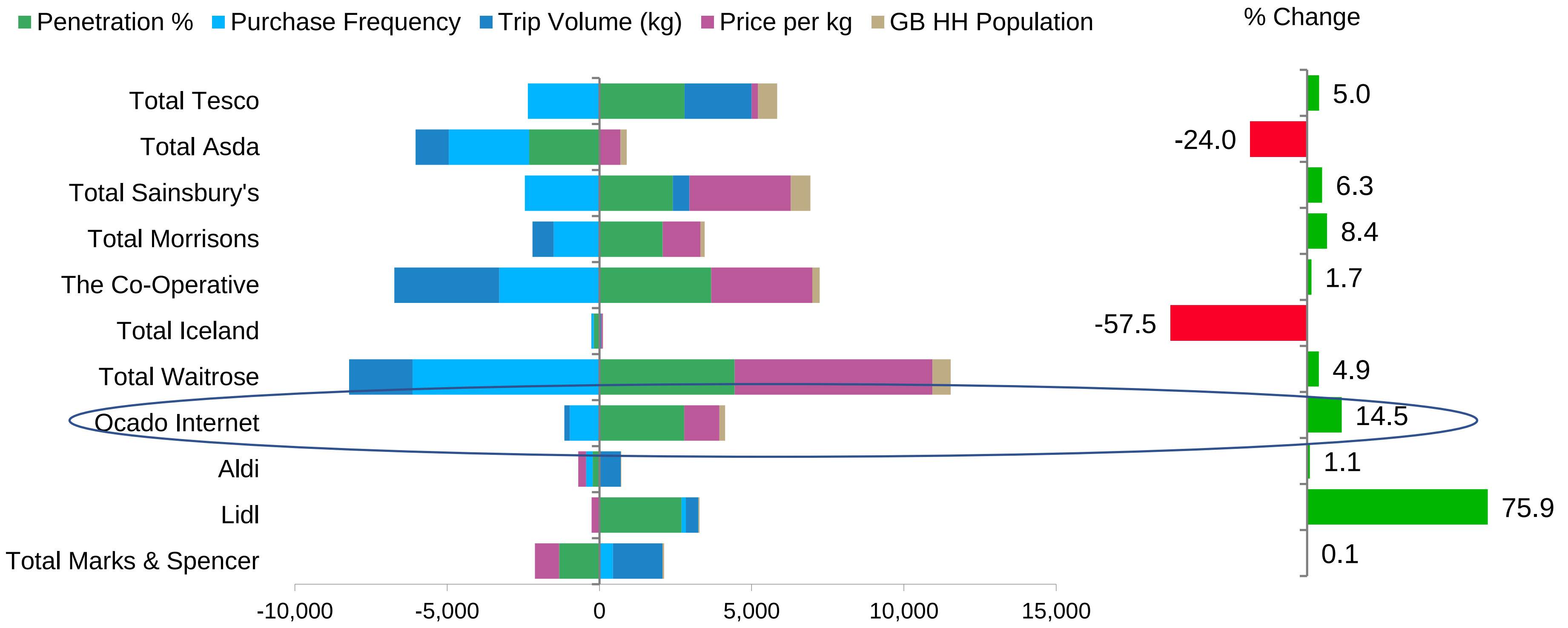
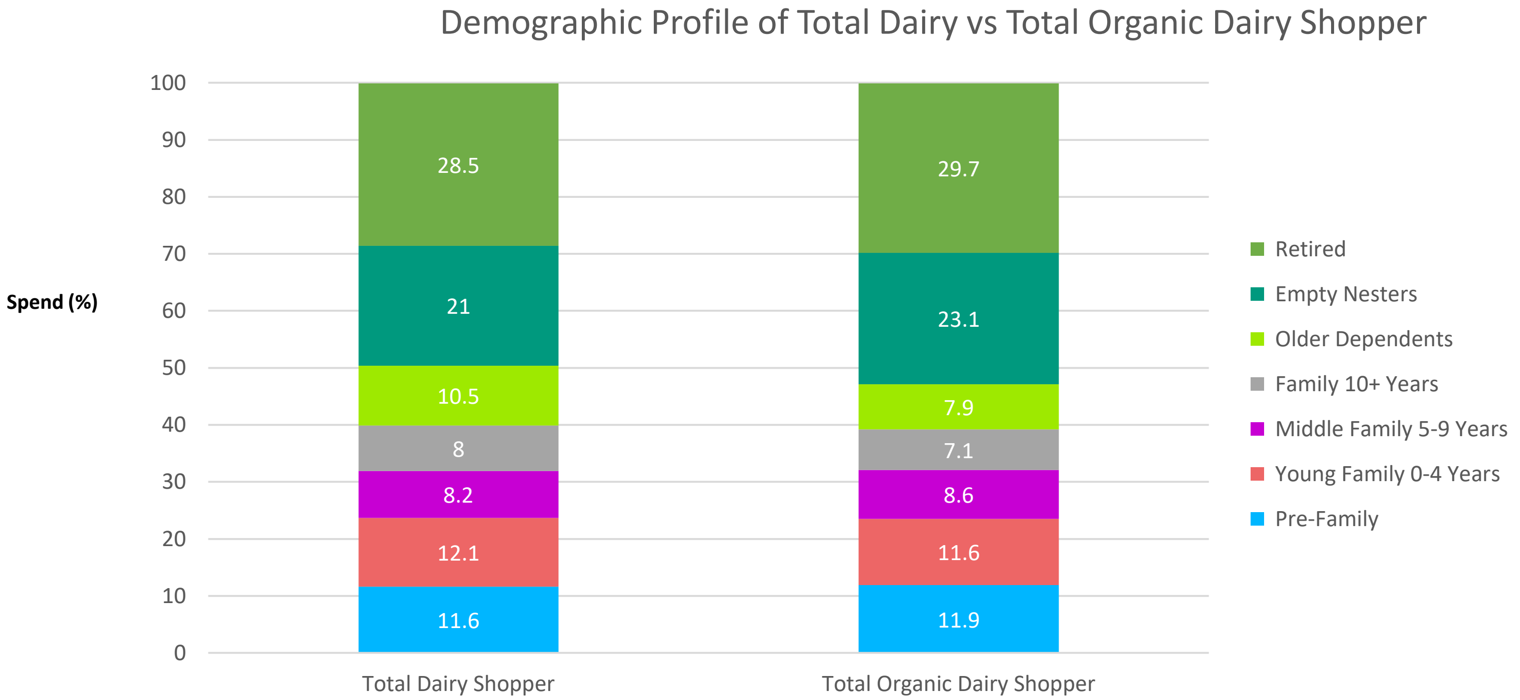
Ocado has increased its share of Total Organic Dairy category to 7.1% attracting new shoppers achieving a 14.5% sales increase.



The Organic Dairy shopper tends to be a 2 person household. Pre-family, empty nesters and retired shoppers all overtrade within Organic Dairy and account for nearly 65% share of this market.



Organic Fruit

- Organic Fruit valued at £117m is in growth of 6.2%. New shoppers is driving sector growth with an increase in average price.

- Organic Fruit growth is in line with Total Fruit market valued at +6b and growing at 6.2% driven by additional volume per trip and increase in average price.

- Tesco is still No. 1 but losing share to Waitrose, Ocado, Asda and the Co-operative all gaining new shoppers into Organic Fruit.

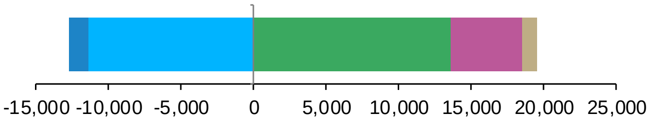
- Waitrose increased market share converted to a 21.8% sales year on year increase due to shoppers purchasing more frequently.

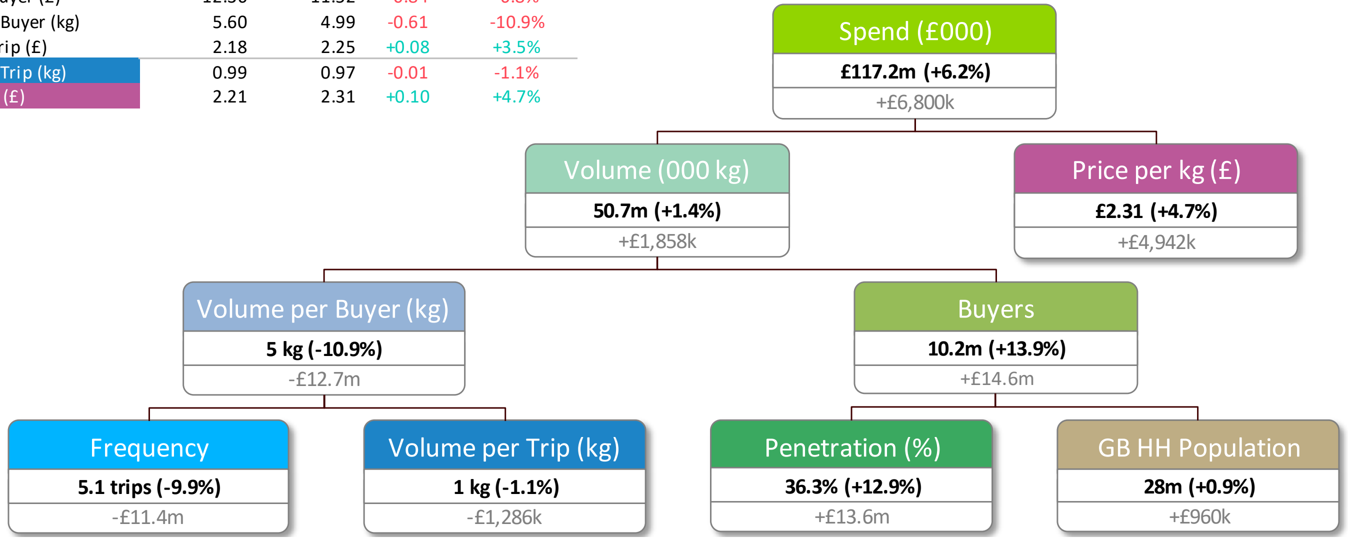
- Strong increase in Pre-Family consumer shopping Organic Fruit. All 3 key cohorts without kids Pre-Family, Retired and Empty Nesters overtrading in Organic Fruit versus Total category.

Organic Fruit valued at £117m is in growth of 6.2%. New shoppers is driving sector growth with an increase in average price.

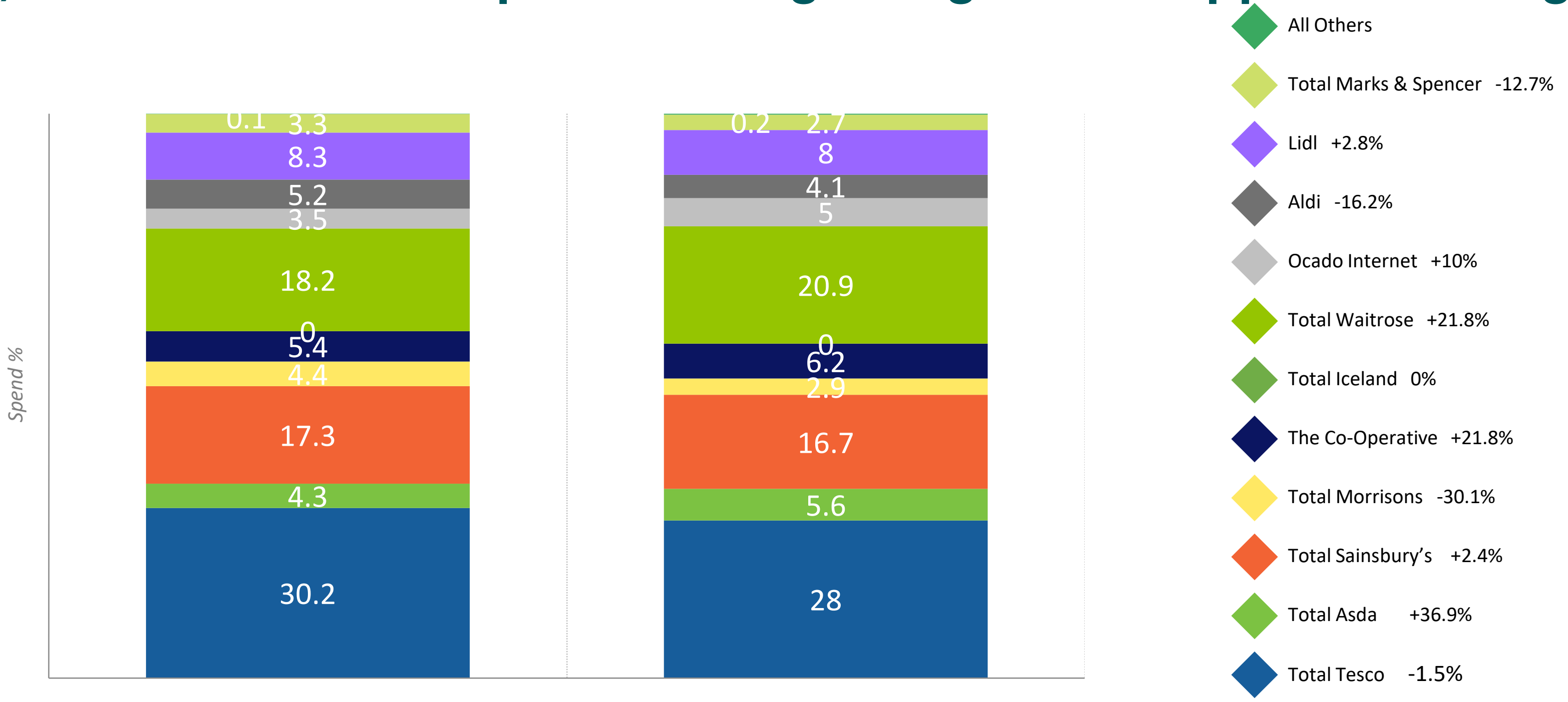
Measure	52 w/e 08 Sep 19	52 w/e 06 Sep 20	Change (Actual)	Change (%)
Spend (£000)	110,387	117,187	+6,800	+6.2%
Volume (000 kg)	49,977	50,688	+711	+1.4%
Penetration (%)	32.19	36.33	+4.14	+12.9%
Frequency	5.68	5.12	-0.56	-9.9%
Spend per Buyer (£)	12.36	11.52	-0.84	-6.8%
Volume per Buyer (kg)	5.60	4.99	-0.61	-10.9%
Spend per Trip (£)	2.18	2.25	+0.08	+3.5%
Volume per Trip (kg)	0.99	0.97	-0.01	-1.1%
Price per kg (£)	2.21	2.31	+0.10	+4.7%

Value up 6.2% worth £6,800k

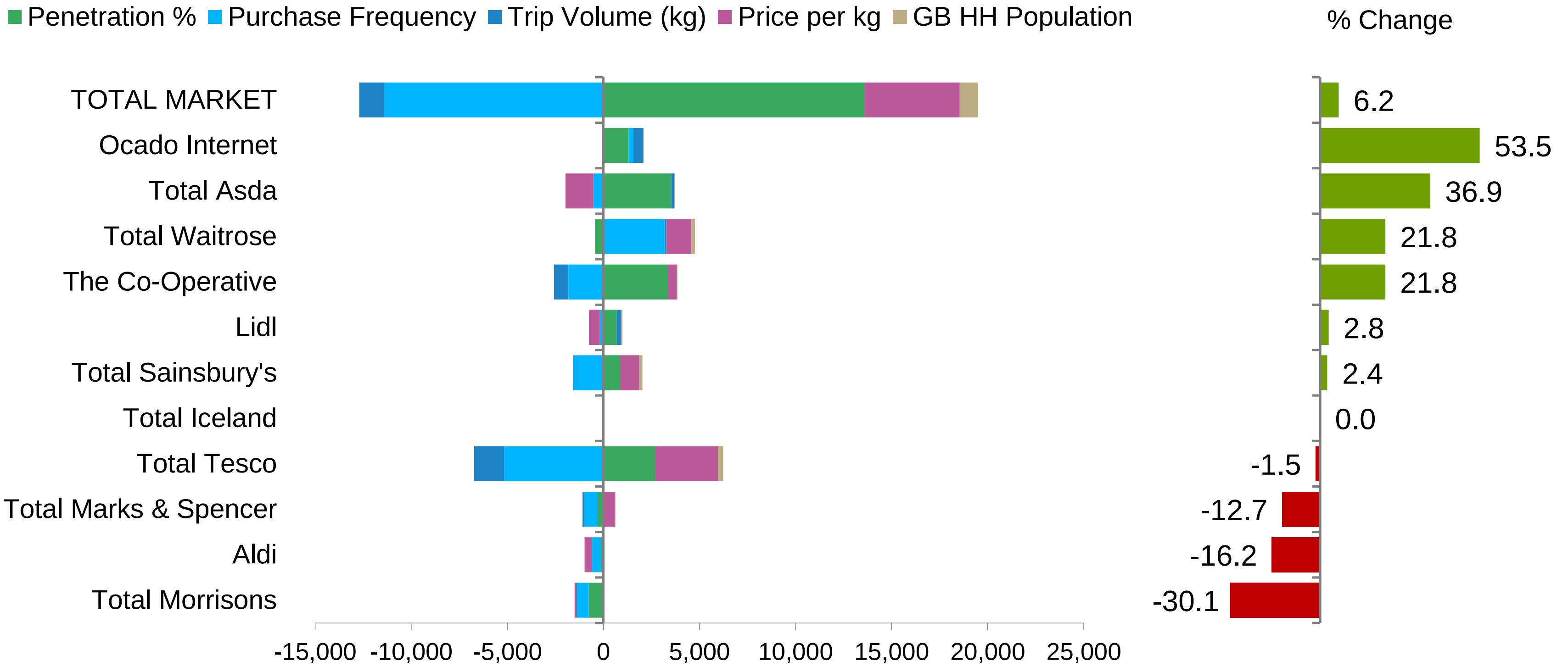




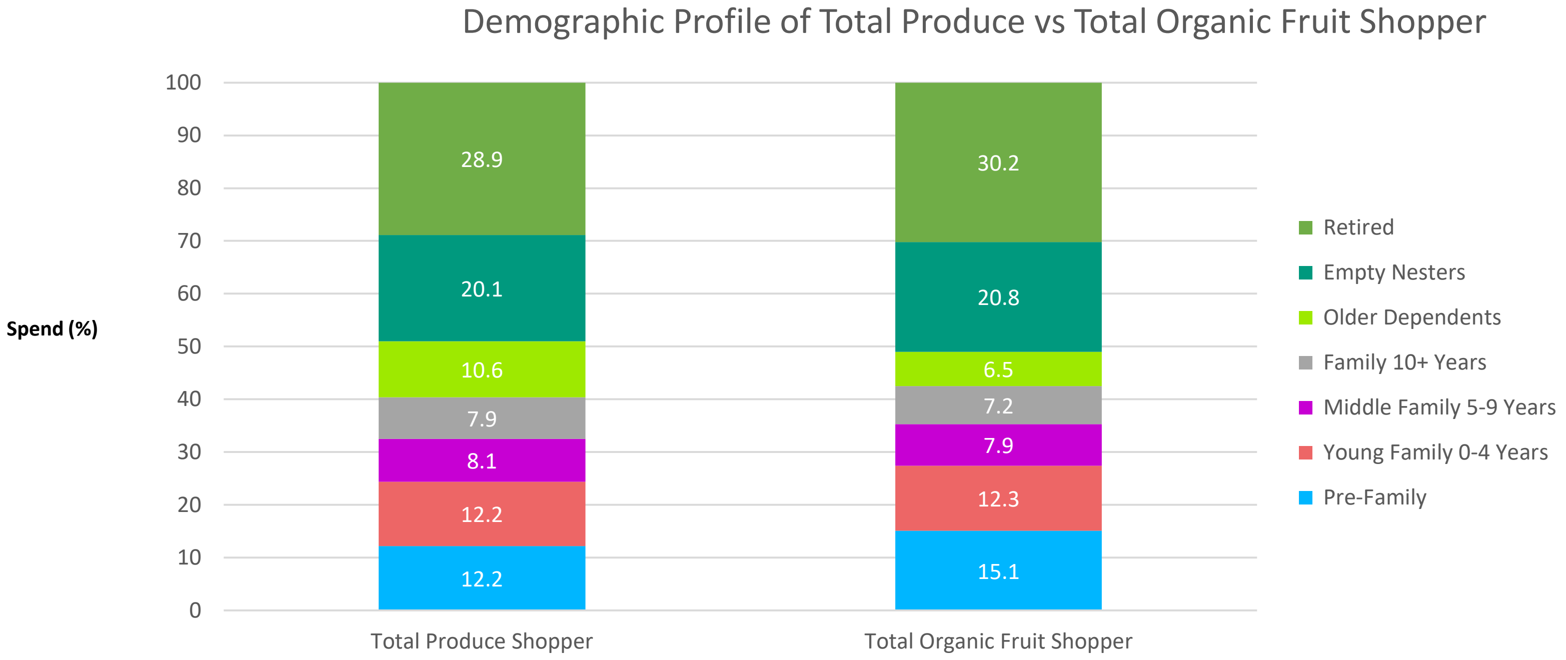
Tesco is still No. 1 in Organic Fruit but losing share to Waitrose. Ocado, Asda and the Co-operative all gaining new shoppers into Organic Fruit.



Waitrose gaining Fruit share driving growth through frequency. Ocado sees 50%+ growth driven by new shoppers buying organic fruit.



Strong increase in Pre-Family consumer shopping Organic Fruit. All 3 key cohorts without kids Pre-Family, Retired and Empty Nesters overtrading in Organic Fruit versus Total category.



Organic Meat

- The Organic Meat market value at +£65m is in strong growth of 14.2% year on year. It is attracting new shoppers into the category and average price increase.

- The Organic Meat market is growing faster then Total Meat market value is +£18.2b, growing at 7.2% year on year.

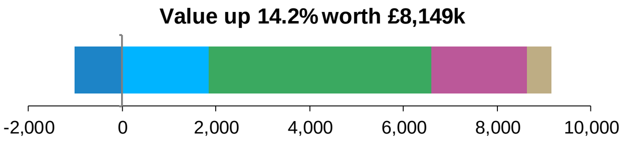
- Sainsbury's holds 1/3 market share of Organic Meat and has grown 19.2%
- Waitrose has lost market share but has held sales.
- M&S has grown market share to 10.7% and increased its sales substantially.
- Tesco share in decline at 10.4%. Ocado now has 10.2% share.

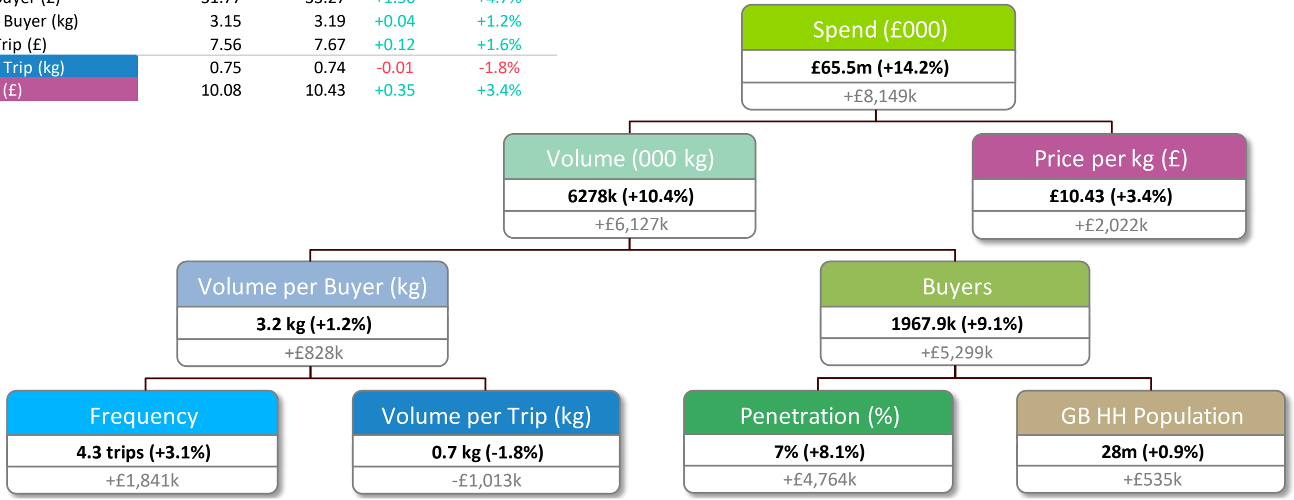
- Sainsbury's, M&S and Ocado's growth has been partially driven by attracting new shoppers into the category.

- Retired, Empty Nesters and Pre-Families driving overtrade in the Organic Meat category v Total Meat.

Organic Meat is valued at +£65m and is in growth of 14.2% by attracting new shoppers into the category and increase in average price.

Measure	52 w/e 08 Sep 19	52 w/e 06 Sep 20	Change (Actual)	Change (%)
Spend (£000)	57,314	65,463	+8,149	+14.2%
Volume (000 kg)	5,685	6,278	+593	+10.4%
Penetration (%)	6.50	7.03	+0.53	+8.1%
Frequency	4.20	4.33	+0.13	+3.1%
Spend per Buyer (£)	31.77	33.27	+1.50	+4.7%
Volume per Buyer (kg)	3.15	3.19	+0.04	+1.2%
Spend per Trip (£)	7.56	7.67	+0.12	+1.6%
Volume per Trip (kg)	0.75	0.74	-0.01	-1.8%
Price per kg (£)	10.08	10.43	+0.35	+3.4%





Sainsbury's holds 1/3 market share of Organic Meat and has grown 19.2%

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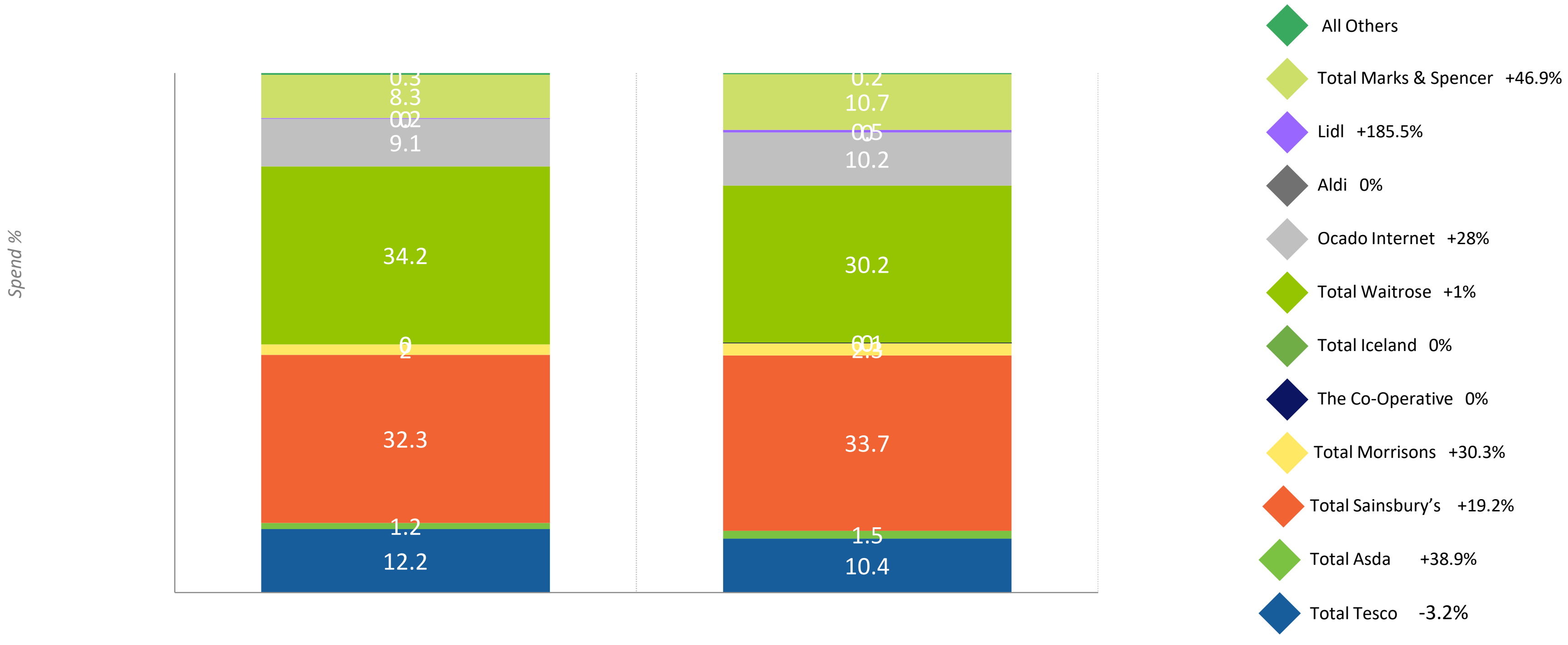
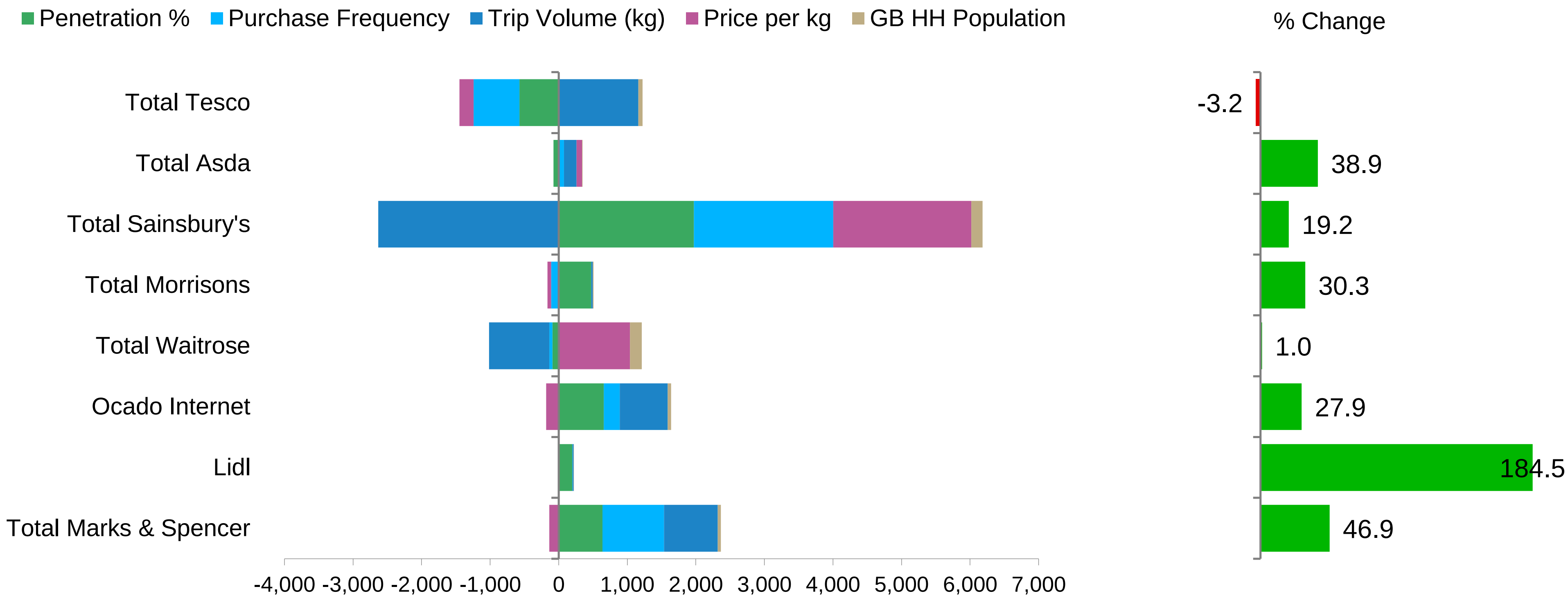
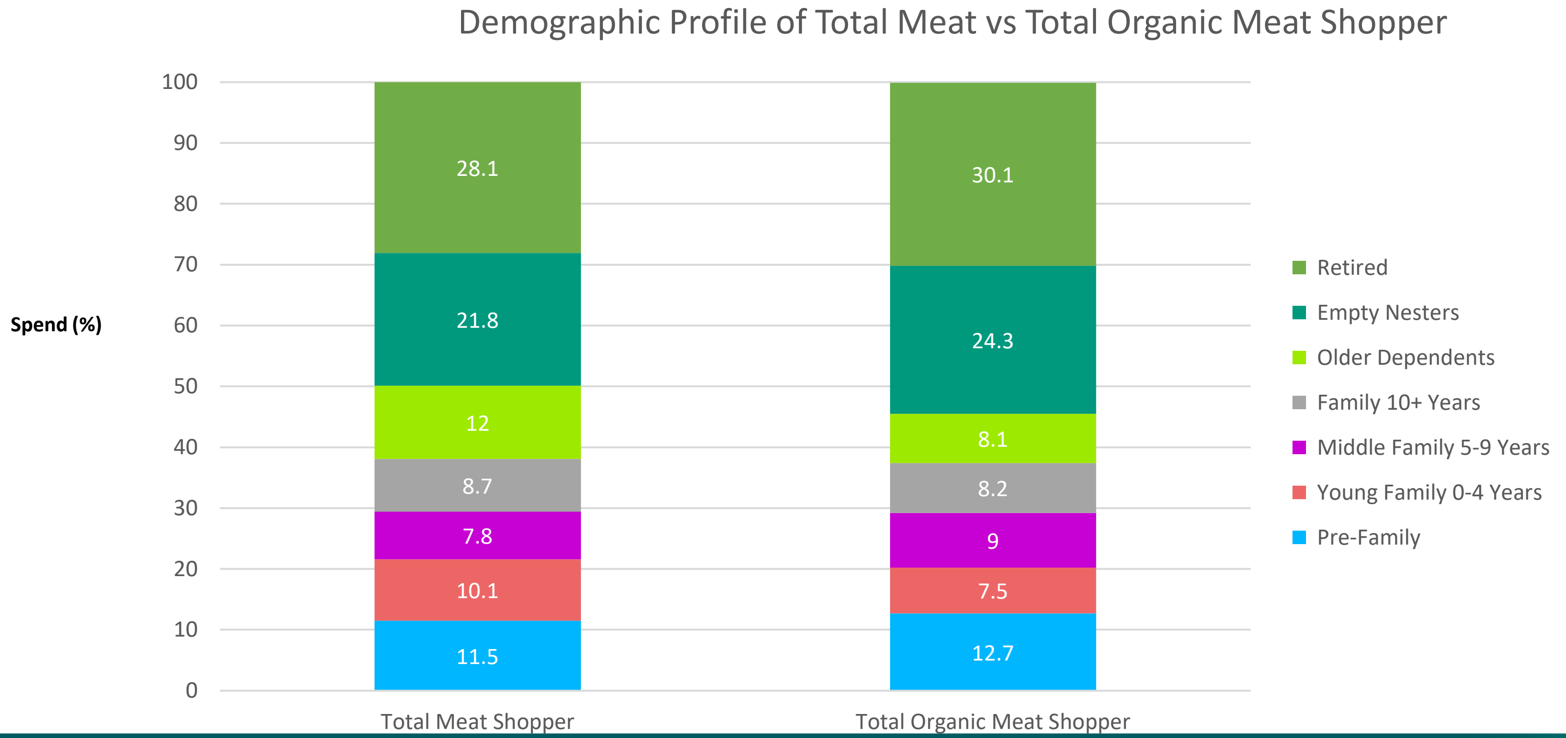
Tesco share in decline at 10.4%. Ocado now has 10.2% share.



Sainsbury's, M&S and Ocado's growth has been partially driven by attracting new shoppers into the category.



Key Organic Meat Purchasers: Retired, Empty Nesters and Pre-Family driving overtrade in the Organic Meat sector v Total Meat.



Total Meat | Organic | Demographic Lifestage | Spend % | 52 w/e 6th September 2020

Organic Poultry

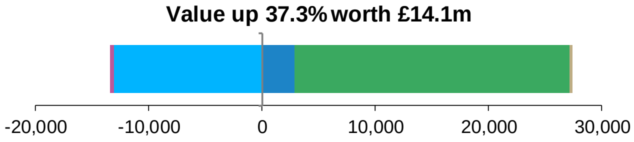
- The Organic Poultry market value is +£83m and growing at 30.5% driven by new shoppers buying into both Poultry and Eggs categories.
  - Organic Eggs is in strong growth valued at £51m and growing 37.3% year on year.
  - Organic Poultry is valued at £32m and has grown 20.9% year on year.

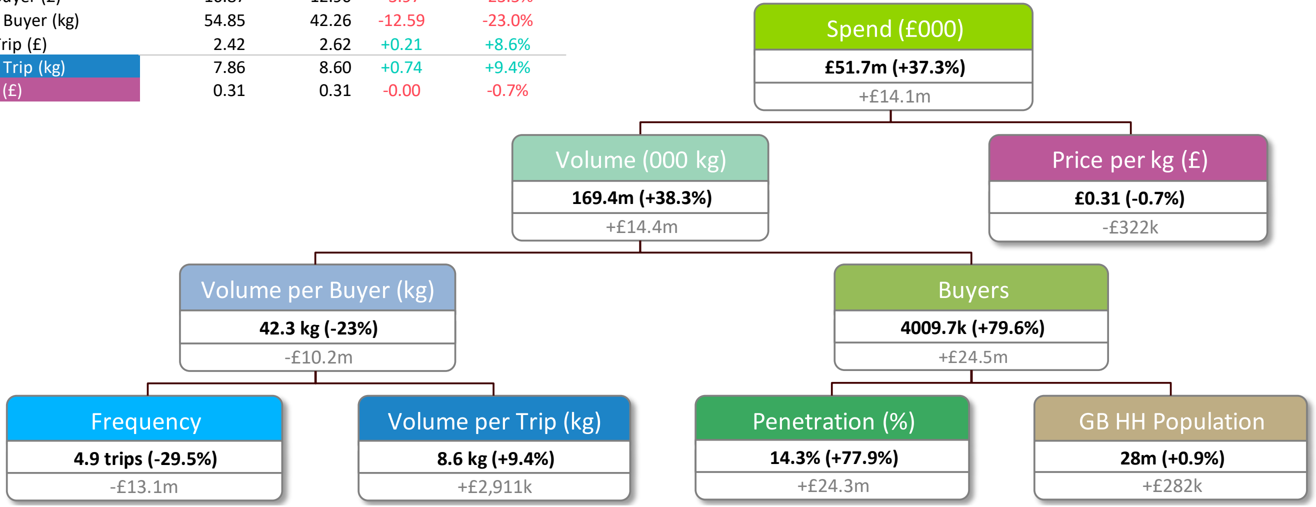
- Waitrose and M&S have made significant share gains holding 29% share and 18.3% respectively. Sainsbury although holding second place with 22.4% share is in decline year on year as is Tesco who now holds 13.1% share.
- Ocado continues to grow share and has now over 10%.

- Retired shoppers account for a third of all spend on Organic Poultry though Middle Family do overtrade slightly with spend on Organic .

Organic Eggs valued at £51.7m in growth by 37.3% driven by new shoppers.

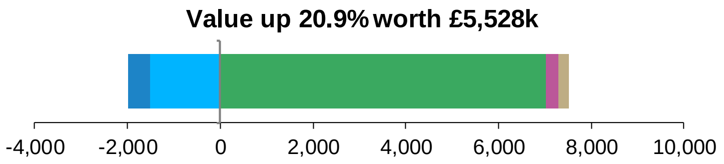
Measure	52 w/e 08 Sep 19	52 w/e 06 Sep 20	Change (Actual)	Change (%)
Spend (£000)	37,676	51,738	+14,062	+37.3%
Volume (000 kg)	122,483	169,436	+46,953	+38.3%
Penetration (%)	8.05	14.33	+6.27	+77.9%
Frequency	6.98	4.92	-2.06	-29.5%
Spend per Buyer (£)	16.87	12.90	-3.97	-23.5%
Volume per Buyer (kg)	54.85	42.26	-12.59	-23.0%
Spend per Trip (£)	2.42	2.62	+0.21	+8.6%
Volume per Trip (kg)	7.86	8.60	+0.74	+9.4%
Price per kg (£)	0.31	0.31	-0.00	-0.7%

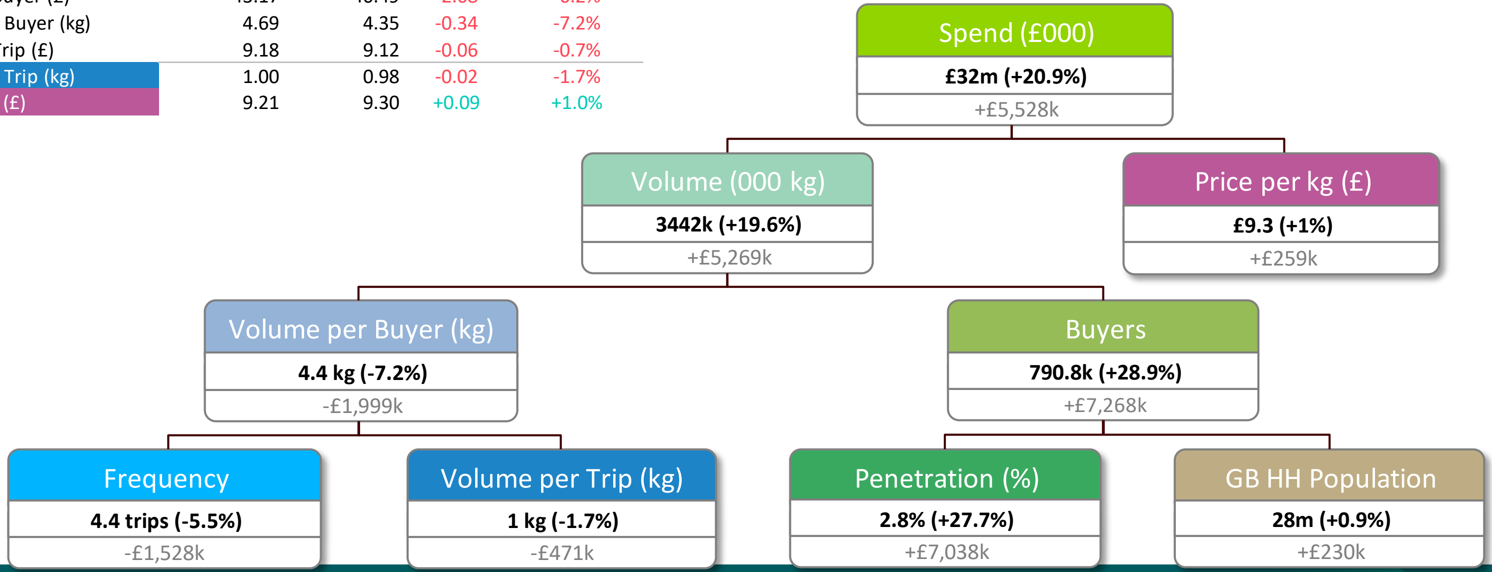




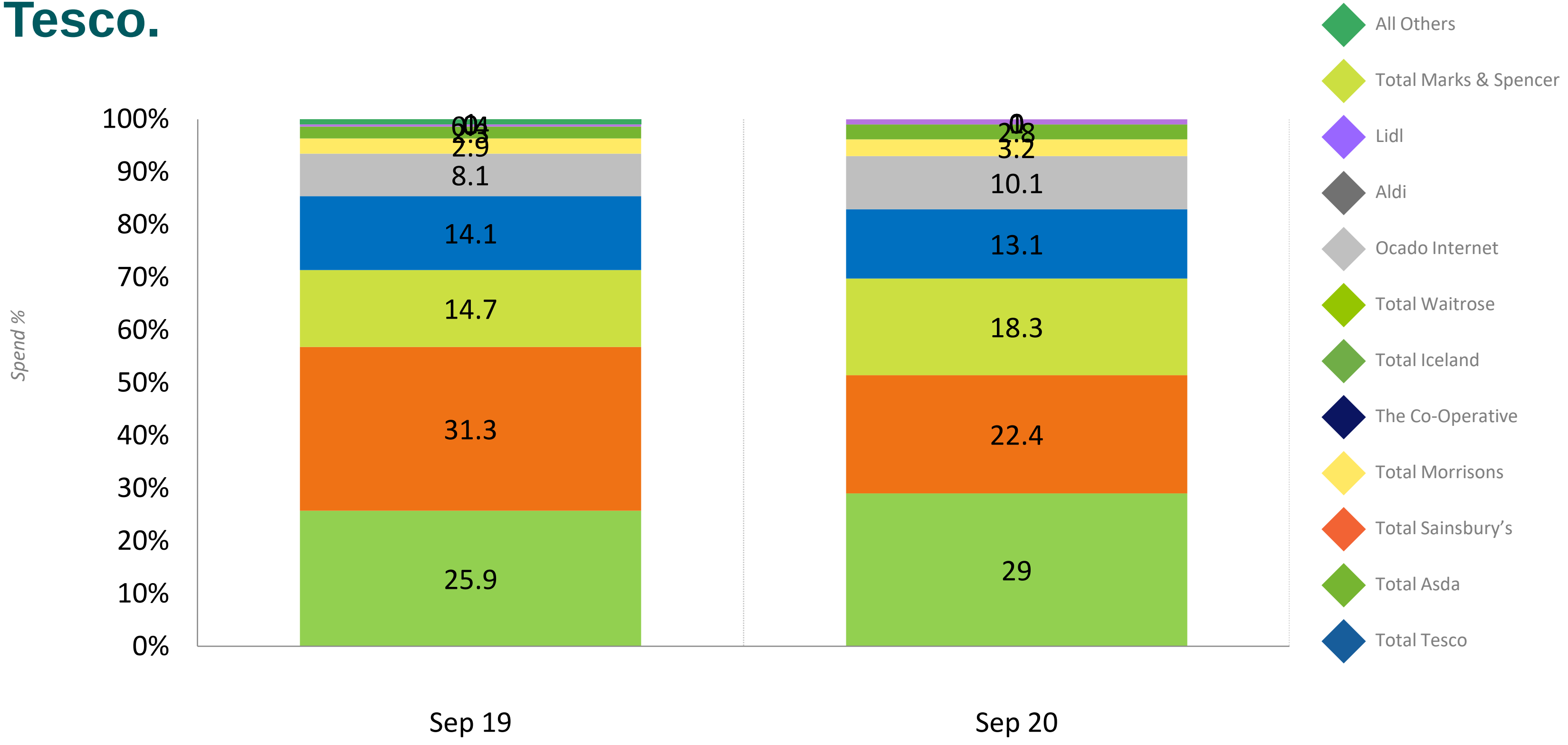
Organic Poultry value £32m has grown by 20.9% in the latest year driven by a notable increase in new shoppers.

Measure	52 w/e 08 Sep 19	52 w/e 06 Sep 20	Change (Actual)	Change (%)
Spend (£000)	26,491	32,019	+5,528	+20.9%
Volume (000 kg)	2,877	3,442	+565	+19.6%
Penetration (%)	2.21	2.83	+0.61	+27.7%
Frequency	4.70	4.44	-0.26	-5.5%
Spend per Buyer (£)	43.17	40.49	-2.68	-6.2%
Volume per Buyer (kg)	4.69	4.35	-0.34	-7.2%
Spend per Trip (£)	9.18	9.12	-0.06	-0.7%
Volume per Trip (kg)	1.00	0.98	-0.02	-1.7%
Price per kg (£)	9.21	9.30	+0.09	+1.0%



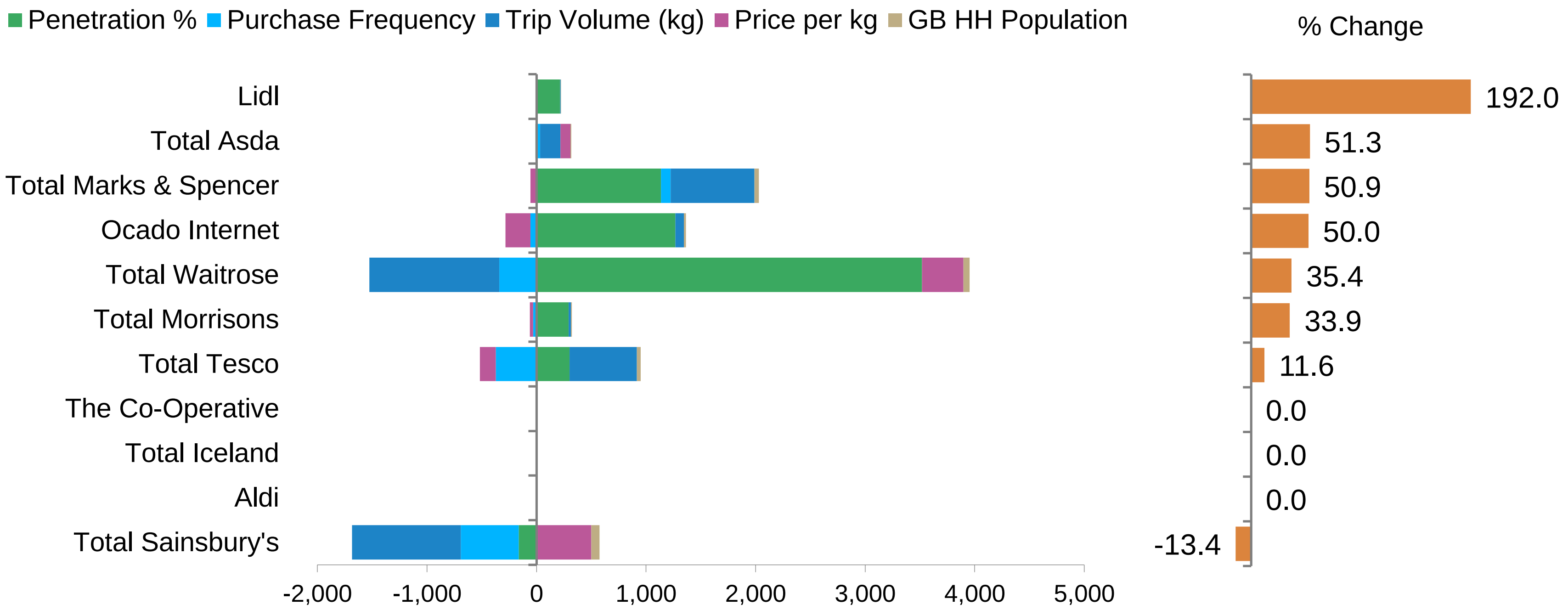


Waitrose & M&S gain significant share at the loss to Sainsbury and Tesco.

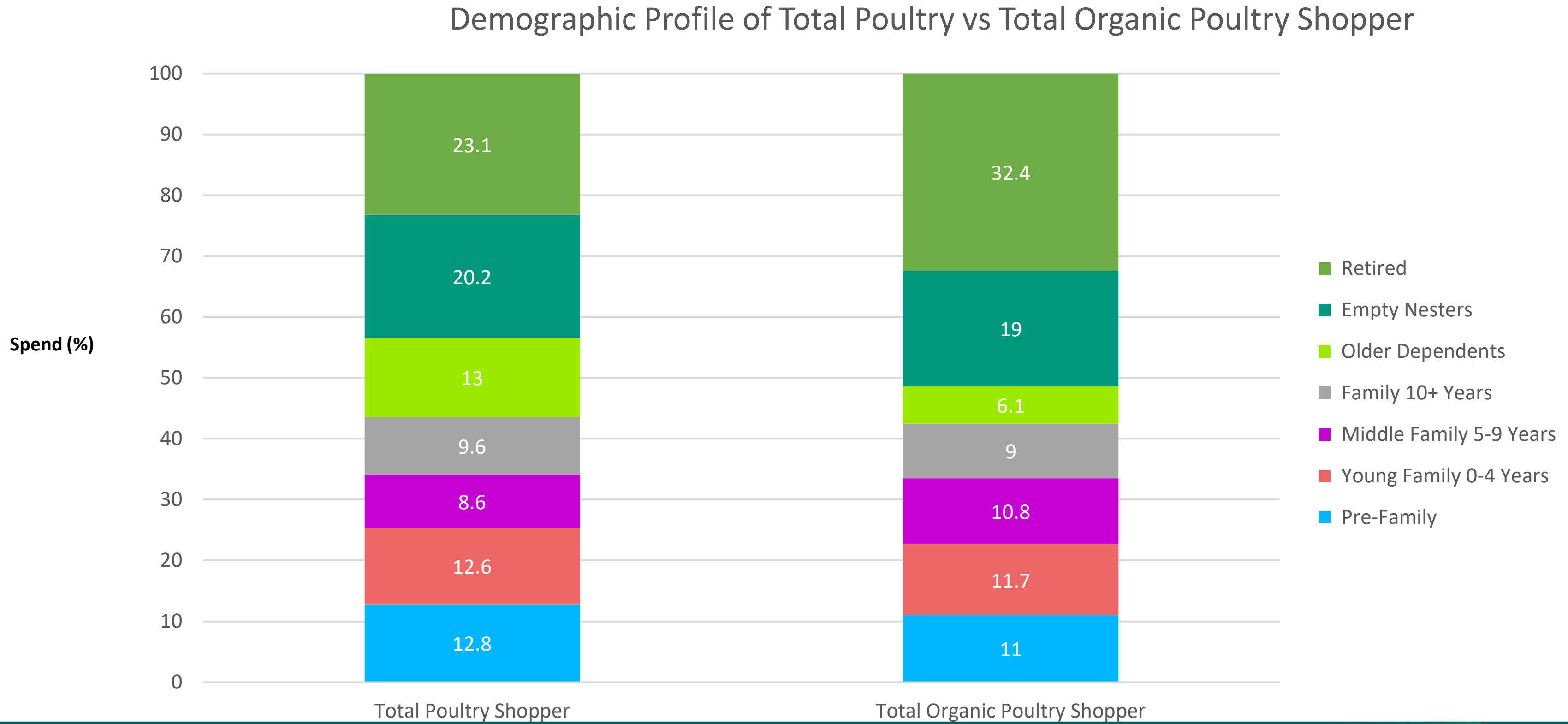


Kantar: Total Fresh and Frozen Poultry | Organic | Retailer Shares| 52 w/e 6th September 2020

Sainsbury is the only member of Big 4 not to see growth whilst Premium retailers grow strongly through new shoppers and Lidl increased presence into the sector



Retired shoppers account for a third of all spend on Organic Poultry though Middle Family do overtrade slightly with spend on Organic .



Organic Fish

- The Organic Fish market value is £8m and growing at +3.7% driven by shoppers buying into the category more frequently.

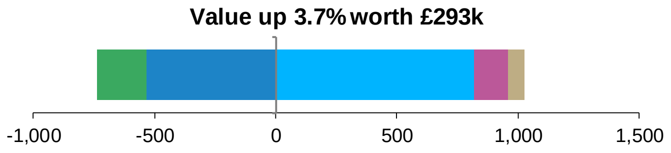
- Organic Fish is growing behind the Total Fish market valued at £3b, growing at 5.8% year on year. Driven by average price increase and additional volume per trip.

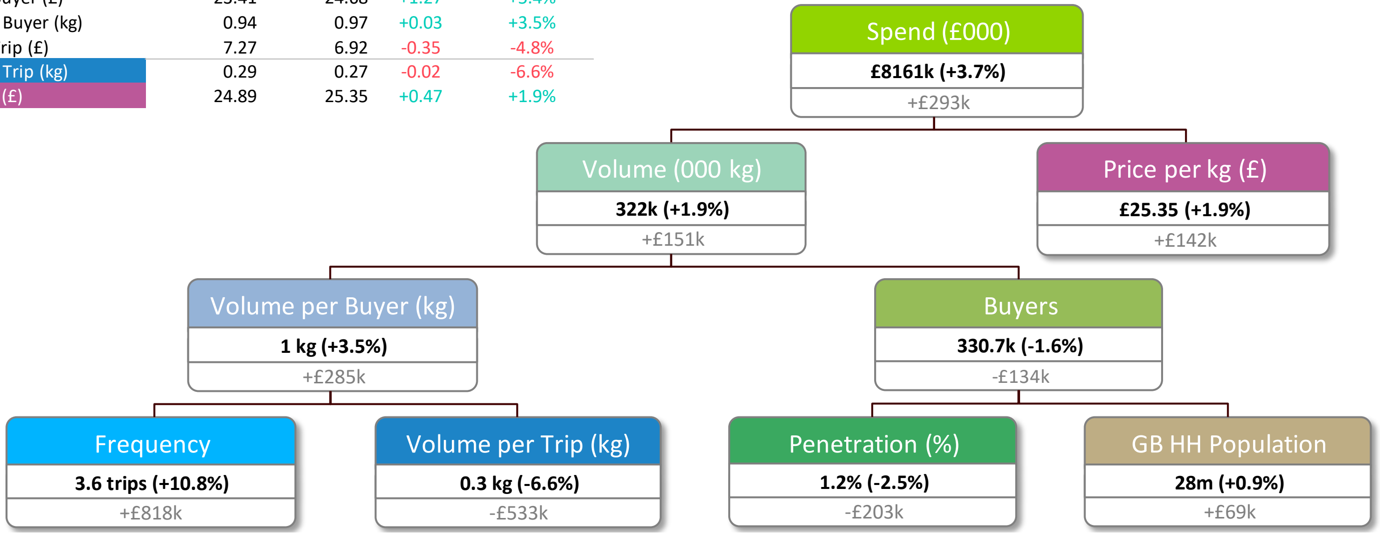
- Within Organic Fish, Waitrose is the key retailer with 82% market share.

- Retired cohort with 43.5% share dominate this category. There is also an increase in Empty Nesters share to 22.8% and Pre families to 12.7% all significantly overtrading Total Fish cohorts.

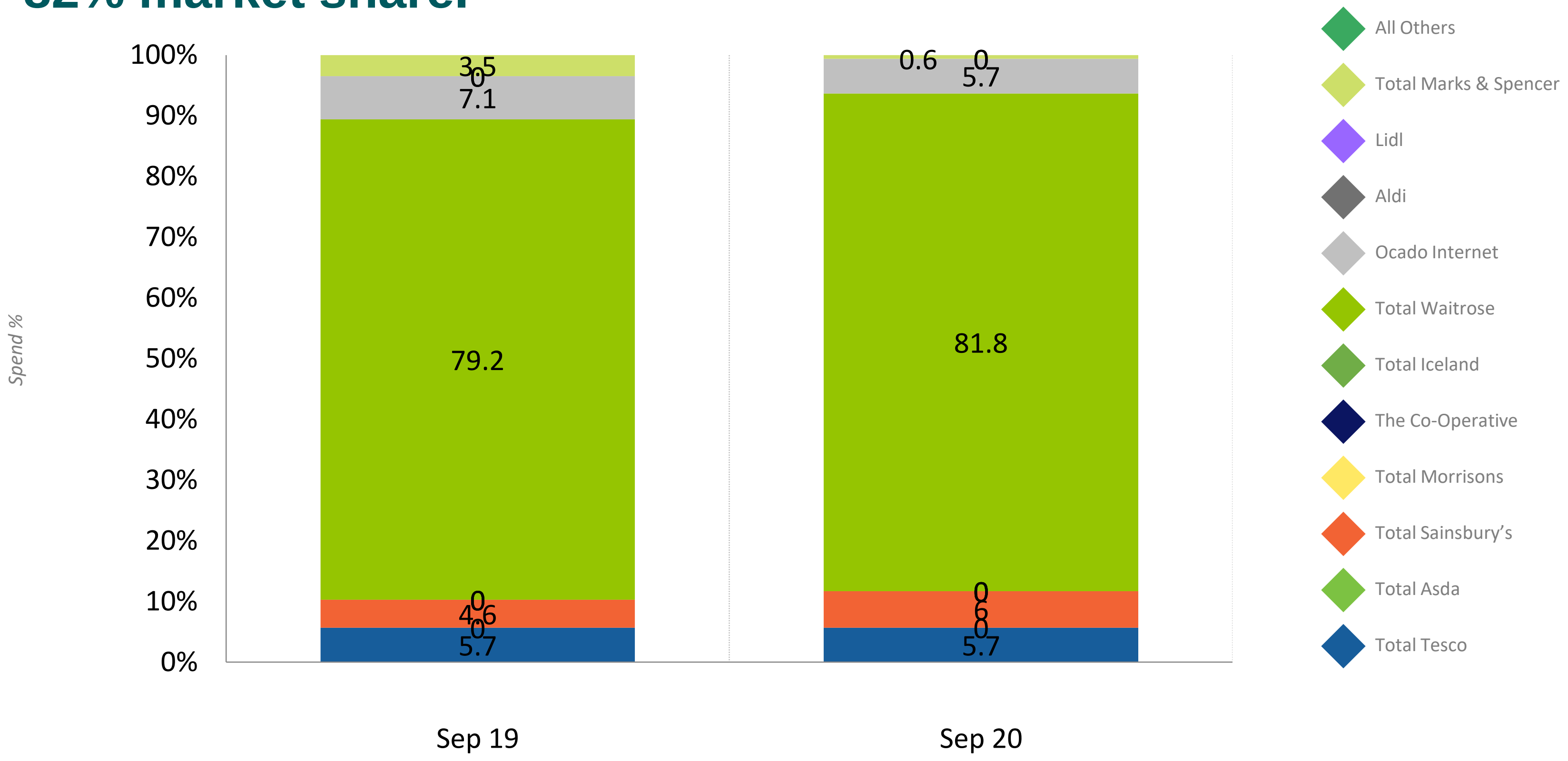
Organic fresh and frozen fish valued at £8m has grown 3.7% which is driven through shoppers buying into the category more frequently.

Measure	52 w/e 08 Sep 19	52 w/e 06 Sep 20	Change (Actual)	Change (%)
Spend (£000)	7,868	8,161	+293	+3.7%
Volume (000 kg)	316	322	+6	+1.9%
Penetration (%)	1.21	1.18	-0.03	-2.5%
Frequency	3.22	3.57	+0.35	+10.8%
Spend per Buyer (£)	23.41	24.68	+1.27	+5.4%
Volume per Buyer (kg)	0.94	0.97	+0.03	+3.5%
Spend per Trip (£)	7.27	6.92	-0.35	-4.8%
Volume per Trip (kg)	0.29	0.27	-0.02	-6.6%
Price per kg (£)	24.89	25.35	+0.47	+1.9%

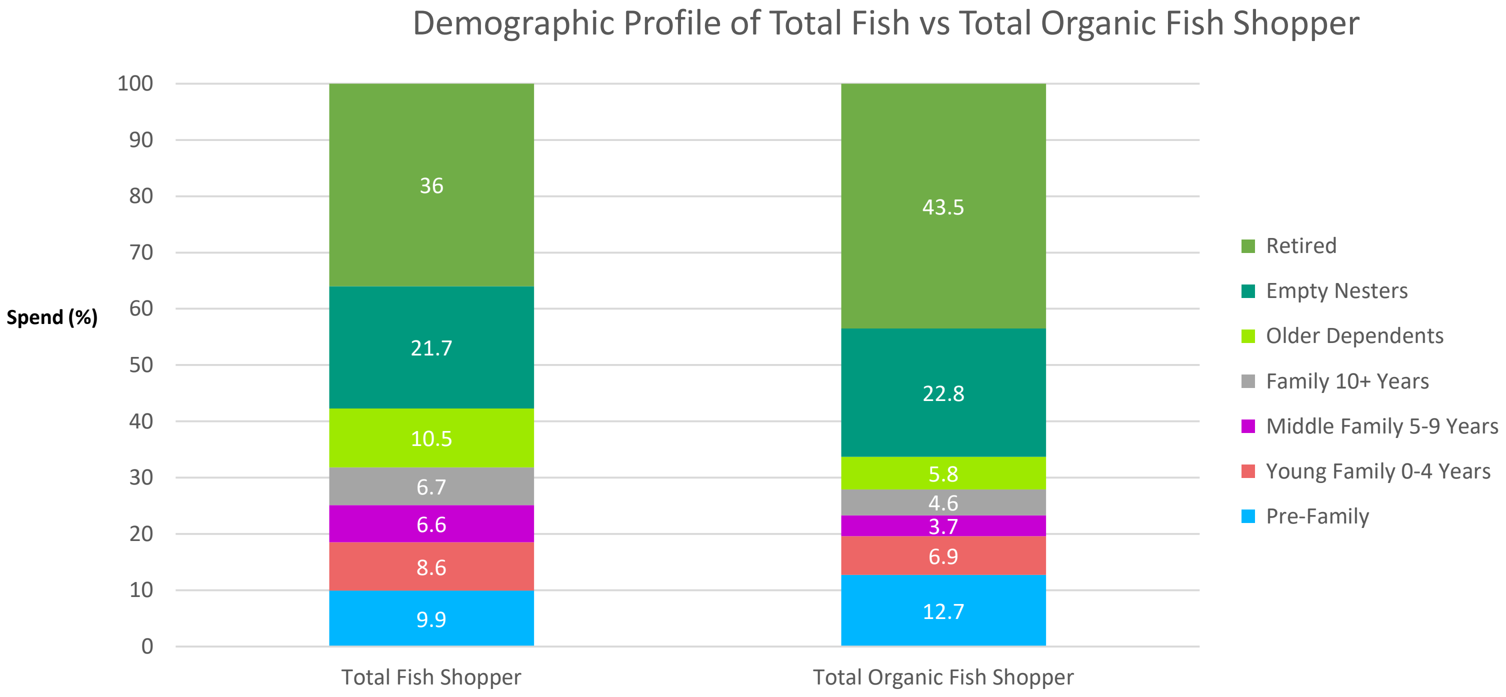




Waitrose is the key Retailer in the Organic Fish market with nearly 82% market share.



Retired cohort with 43.5% share dominate category. Empty Nesters and Pre Families have also significant increased market share overtrading Total Fish cohorts.



Organic Ambient

- The Organic Ambient Groceries market of £356m is growing ahead of the Total Ambient Grocery market at + 12.9%. This is driven predominately through attracting new shoppers into the market over the past year.

- The Total Ambient Groceries valued at £35b is up +9.4% as shoppers are putting more volume into their baskets.

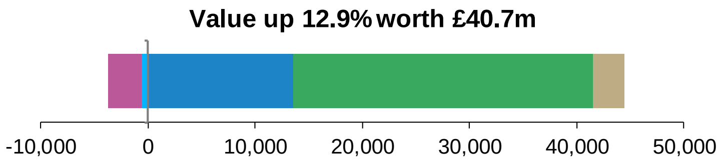
- Both Waitrose and Sainsbury's grow ahead of the Total Market and continue to increase their market share. Tesco in share decline but delivering 11.5% sales growth.
- Ocado now the 4th biggest share at 7.3% of this category and driving 17.5% YOY.

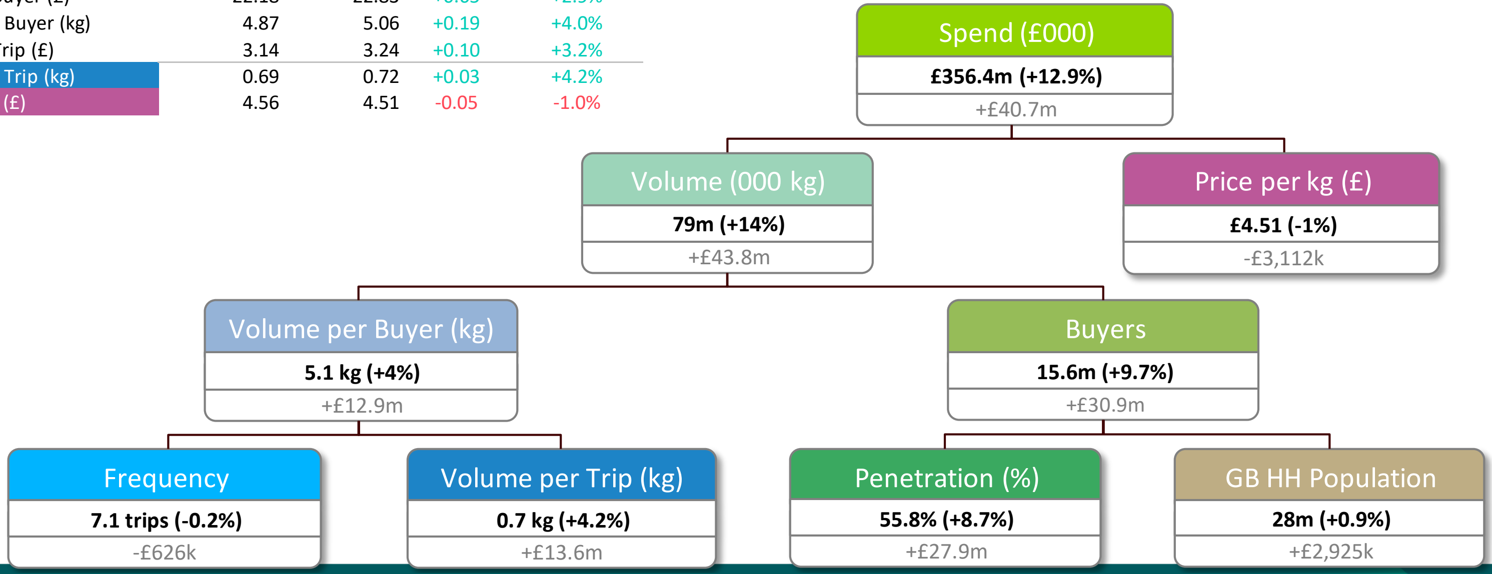
- The Top 4 Retailers growth has been accelerated through not only attracting new shoppers into the store but also through shoppers putting more volume into their baskets.

- The Organic Ambient Grocery shopper share is driven by strong growth in Retired Empty Nesters and Pre-Families all overtrading against Total Ambient segments. Mainly two person households with no children.

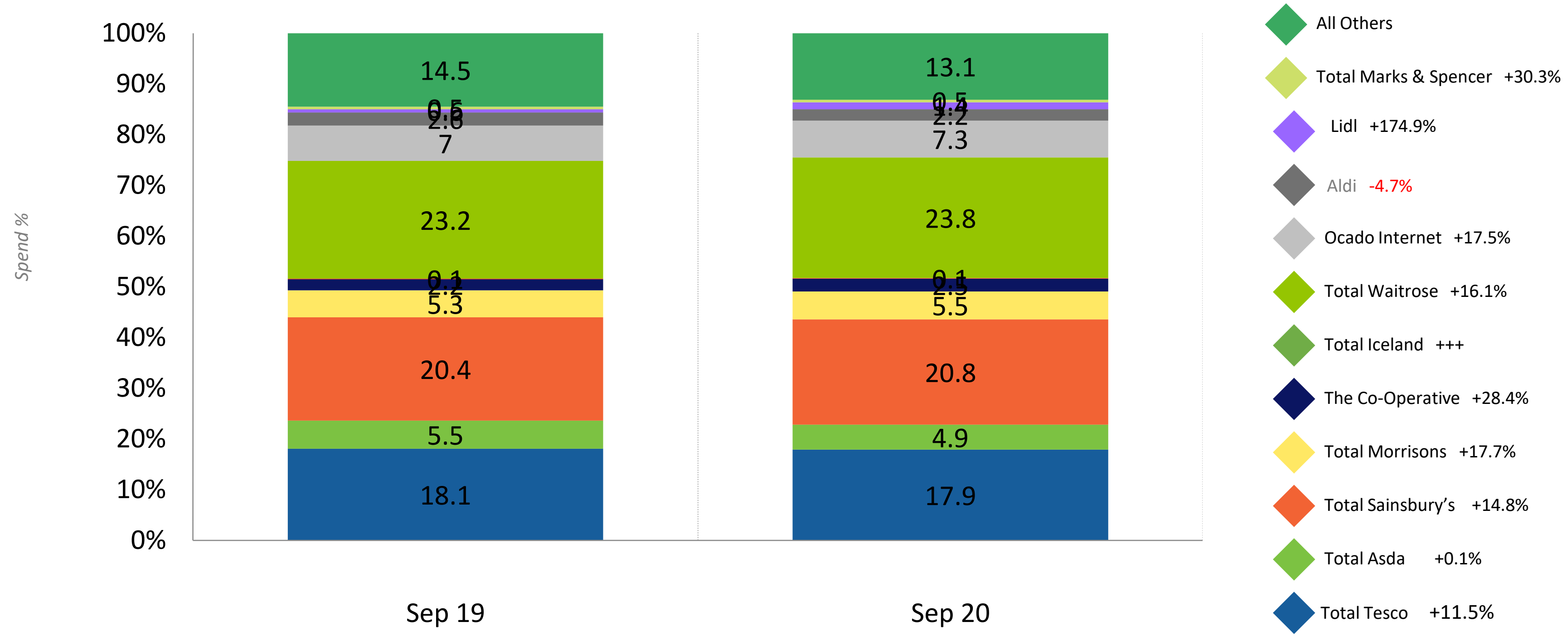
The Organic Ambient groceries market of £356m grows ahead of the total Ambient Grocery market at +12.9%, predominately driven through attracting new shoppers into the market over the last year.

Measure	52 w/e 08 Sep 19	52 w/e 06 Sep 20	Change (Actual)	Change (%)
Spend (£000)	315,757	356,447	+40,690	+12.9%
Volume (000 kg)	69,290	79,014	+9,724	+14.0%
Penetration (%)	51.32	55.77	+4.45	+8.7%
Frequency	7.07	7.06	-0.01	-0.2%
Spend per Buyer (£)	22.18	22.83	+0.65	+2.9%
Volume per Buyer (kg)	4.87	5.06	+0.19	+4.0%
Spend per Trip (£)	3.14	3.24	+0.10	+3.2%
Volume per Trip (kg)	0.69	0.72	+0.03	+4.2%
Price per kg (£)	4.56	4.51	-0.05	-1.0%

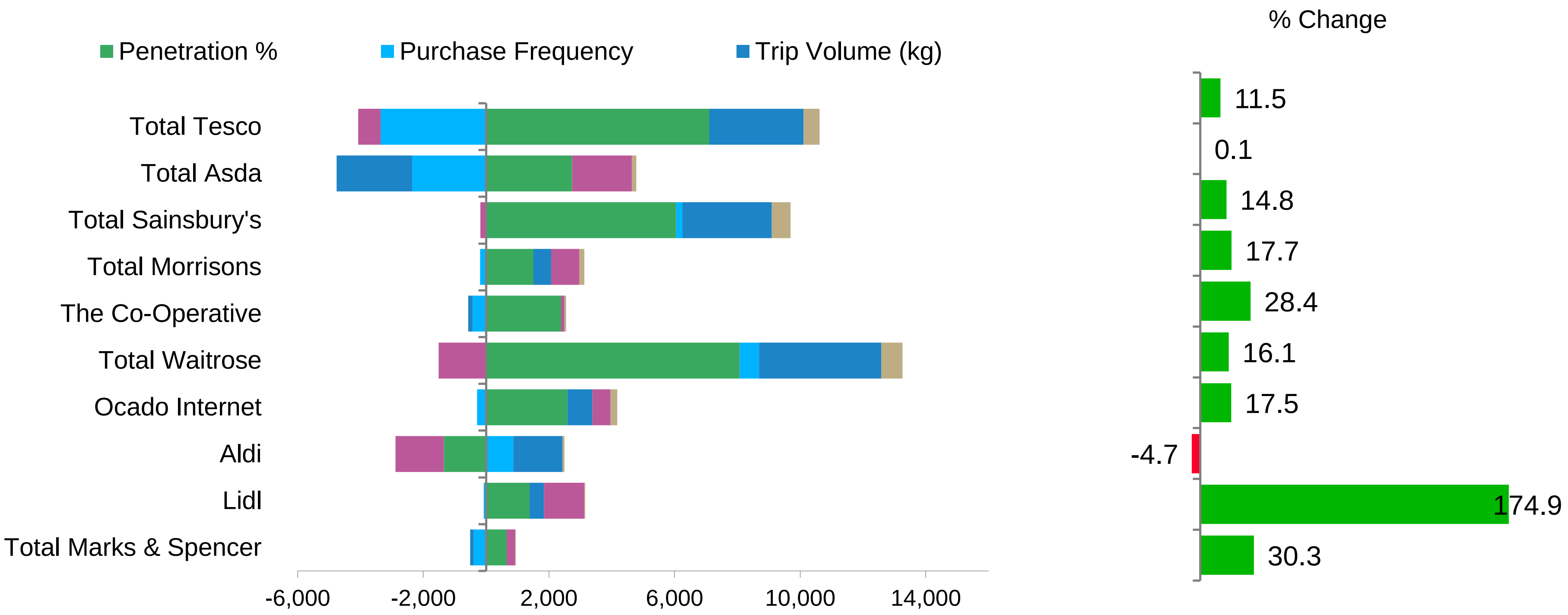




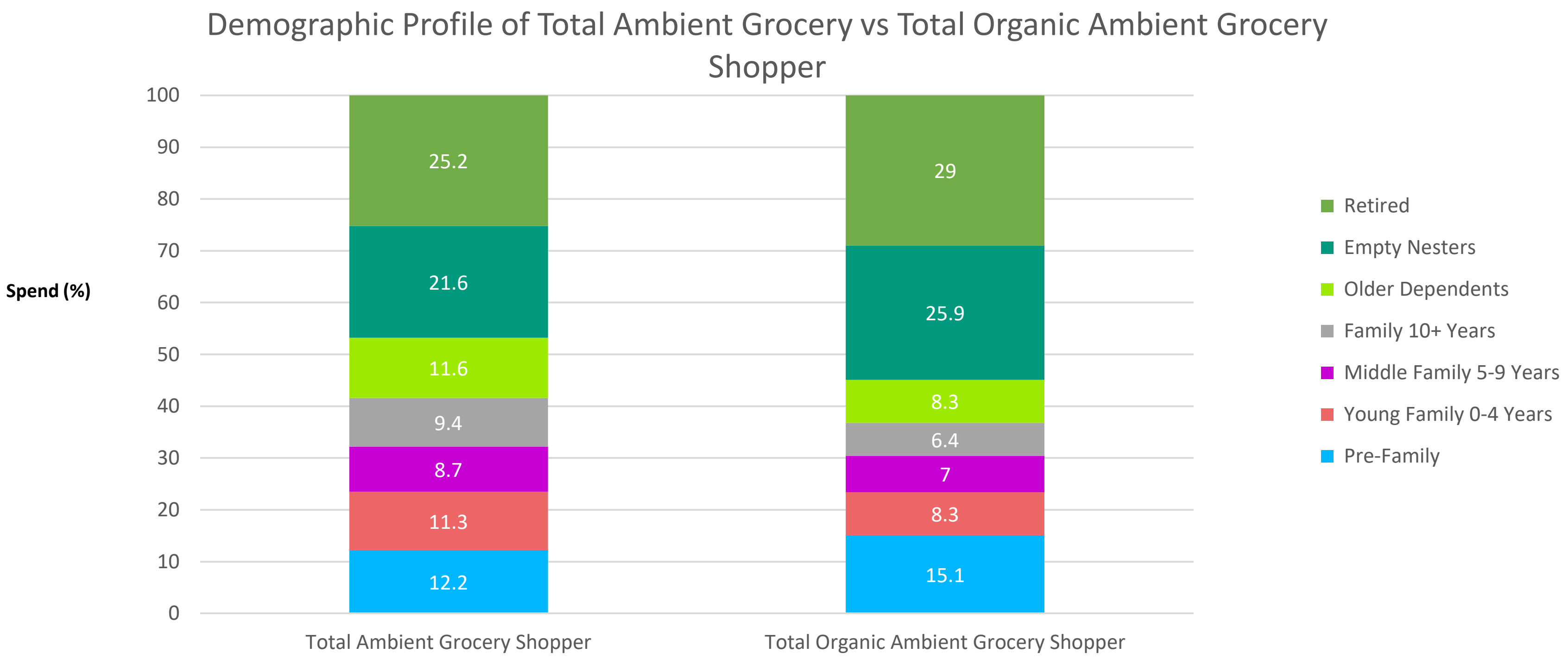
Both Waitrose and Sainsbury's grow ahead of the Total Market and continue to increase their market share. Tesco in share decline but delivering 11.5% sales growth. Ocado now the 4th biggest share at 7.3% of this category and driving 17.5% YOY.



The Top 4 Retailers growth has been accelerated through not only attracting new shoppers into the store but also through shoppers putting more volume into their baskets.

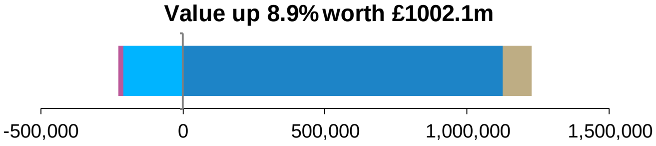


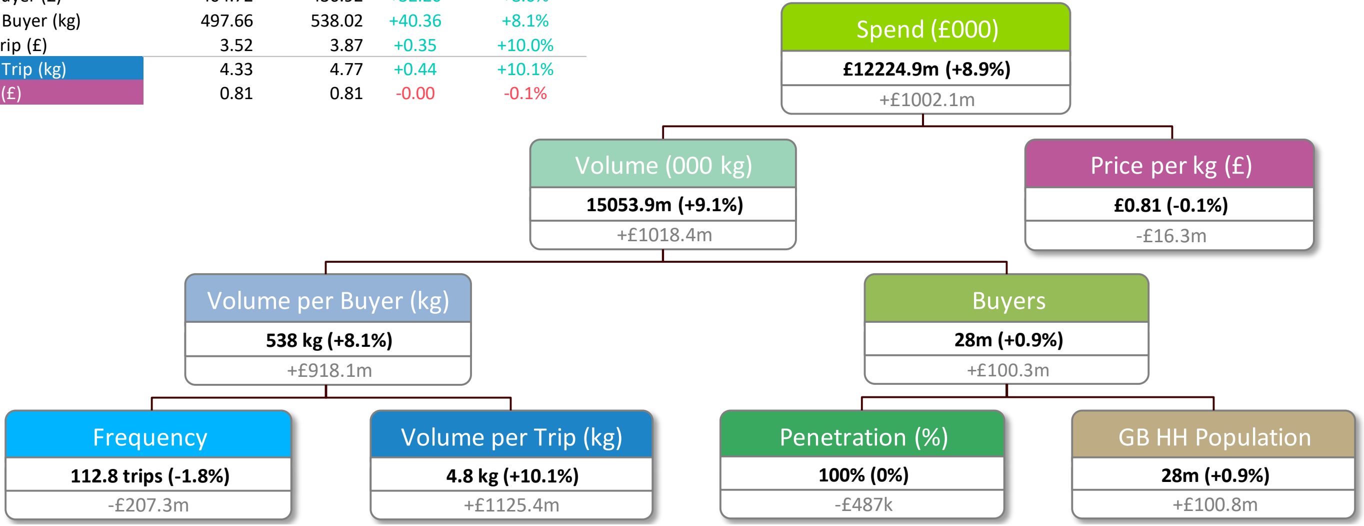
The Organic Ambient Grocery shopper share is driven by strong growth in Retired Empty Nesters and Pre-Families all overtrading against Total Ambient segments. Mainly two person households with no kids.



Total Dairy value +£12.2 billion growing at 8.9% ahead of the Organic Dairy driven by existing shoppers putting more into their baskets.

Measure	52 w/e 08 Sep 19	52 w/e 06 Sep 20	Change (Actual)	Change (%)
Spend (£000)	11,222,810	12,224,920	+1,002,110	+8.9%
Volume (000 kg)	13,800,040	15,053,940	+1,253,900	+9.1%
Penetration (%)	99.97	99.97	-0.00	-0.0%
Frequency	114.93	112.82	-2.10	-1.8%
Spend per Buyer (£)	404.72	436.92	+32.20	+8.0%
Volume per Buyer (kg)	497.66	538.02	+40.36	+8.1%
Spend per Trip (£)	3.52	3.87	+0.35	+10.0%
Volume per Trip (kg)	4.33	4.77	+0.44	+10.1%
Price per kg (£)	0.81	0.81	-0.00	-0.1%

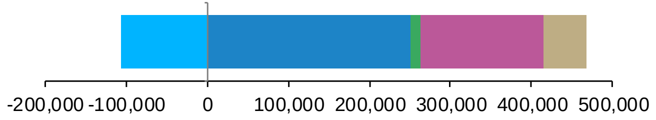




The Total Fruit market valued at +£6b and growing at +6.3% driven by additional volume per trip and increase in average price.

Measure	52 w/e 08 Sep 19	52 w/e 06 Sep 20	Change (Actual)	Change (%)
Spend (£000)	5,796,527	6,159,109	+362,582	+6.3%
Volume (000 kg)	2,622,302	2,715,337	+93,035	+3.5%
Penetration (%)	99.10	99.29	+0.19	+0.2%
Frequency	68.69	67.44	-1.25	-1.8%
Spend per Buyer (£)	210.88	221.63	+10.75	+5.1%
Volume per Buyer (kg)	95.40	97.71	+2.31	+2.4%
Spend per Trip (£)	3.07	3.29	+0.22	+7.1%
Volume per Trip (kg)	1.39	1.45	+0.06	+4.3%
Price per kg (£)	2.21	2.27	+0.06	+2.6%

Value up 6.3% worth £362.6m



Spend (£000)
£6159.1m (+6.3%)
+£362.6m

Volume (000 kg)
2715.3m (+3.5%)
+£210.4m

Price per kg (£)
£2.27 (+2.6%)
+£152.2m

Volume per Buyer (kg)
97.7 kg (+2.4%)
+£146.4m

Buyers
27.8m (+1.1%)
+£64m

Frequency
67.4 trips (-1.8%)
-£105.3m

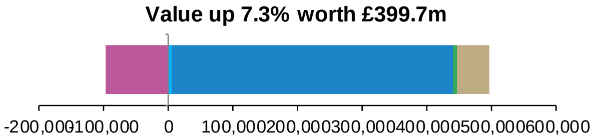
Volume per Trip (kg)
1.4 kg (+4.3%)
+£251.7m

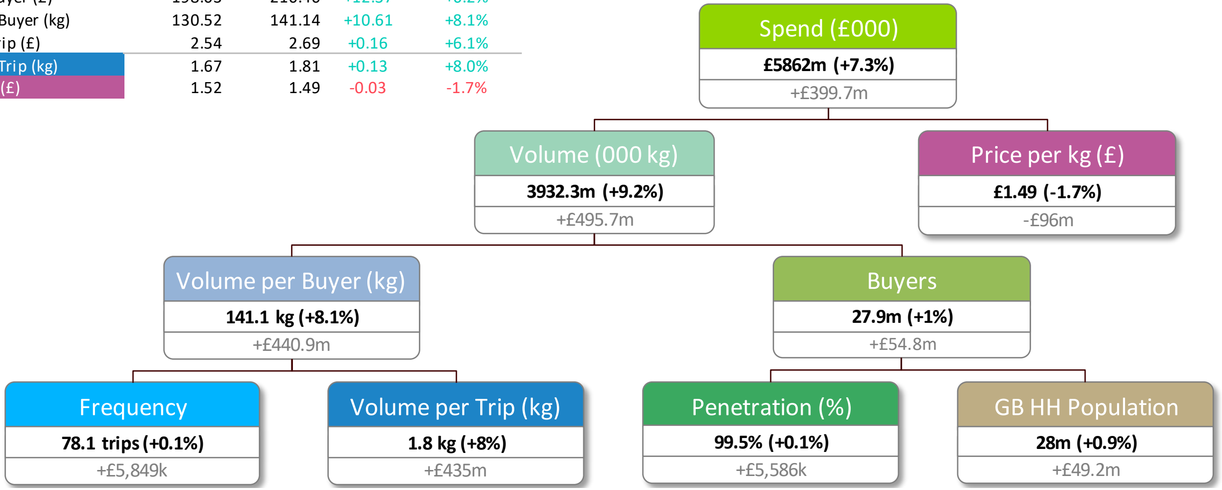
Penetration (%)
99.3% (+0.2%)
+£11.2m

GB HH Population
28m (+0.9%)
+£52.8m

The Total Vegetable market value at £5.8b is behind Organic Vegetables despite seeing strong growth of 7.3% through shoppers putting more vegetables into their baskets.

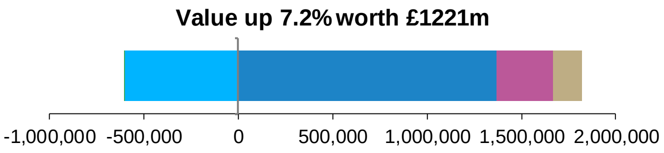
Measure	52 w/e 08 Sep 19	52 w/e 06 Sep 20	Change (Actual)	Change (%)
Spend (£000)	5,462,300	5,862,014	+399,714	+7.3%
Volume (000 kg)	3,600,157	3,932,260	+332,103	+9.2%
Penetration (%)	99.44	99.54	+0.10	+0.1%
Frequency	78.01	78.09	+0.08	+0.1%
Spend per Buyer (£)	198.03	210.40	+12.37	+6.2%
Volume per Buyer (kg)	130.52	141.14	+10.61	+8.1%
Spend per Trip (£)	2.54	2.69	+0.16	+6.1%
Volume per Trip (kg)	1.67	1.81	+0.13	+8.0%
Price per kg (£)	1.52	1.49	-0.03	-1.7%

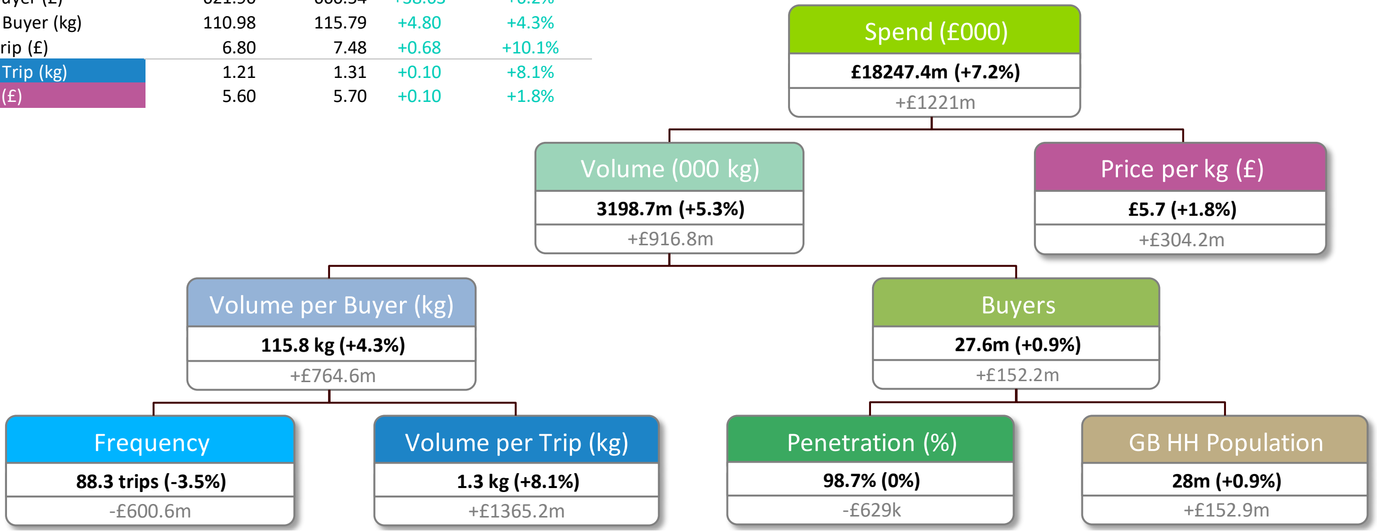




The Total Meat market is valued at +£18.2b and is growing by 7.2% YOY.

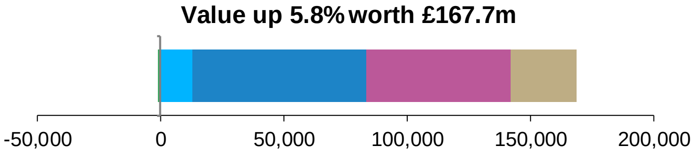
Measure	52 w/e 08 Sep 19	52 w/e 06 Sep 20	Change (Actual)	Change (%)
Spend (£000)	17,026,440	18,247,400	+1,220,960	+7.2%
Volume (000 kg)	3,038,519	3,198,666	+160,147	+5.3%
Penetration (%)	98.70	98.70	-0.00	-0.0%
Frequency	91.45	88.26	-3.19	-3.5%
Spend per Buyer (£)	621.90	660.54	+38.63	+6.2%
Volume per Buyer (kg)	110.98	115.79	+4.80	+4.3%
Spend per Trip (£)	6.80	7.48	+0.68	+10.1%
Volume per Trip (kg)	1.21	1.31	+0.10	+8.1%
Price per kg (£)	5.60	5.70	+0.10	+1.8%

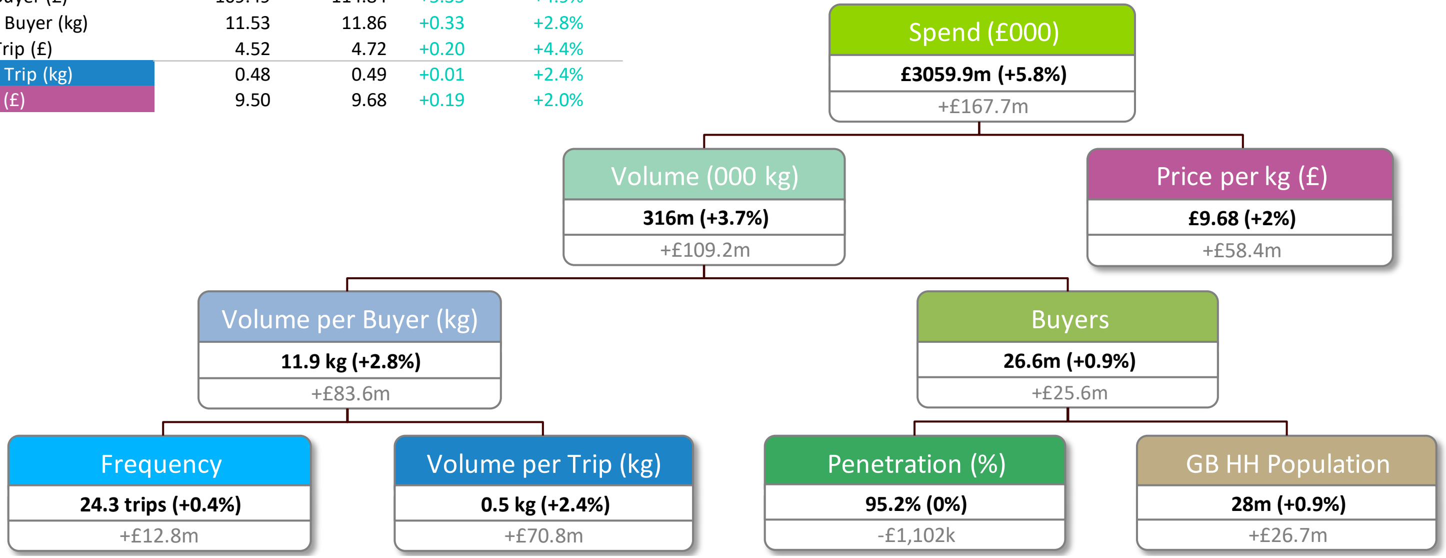




The Total Fish market valued at £3b is in growth of 5.8% yoy which is driven through increase in average price and additional volume per trip.

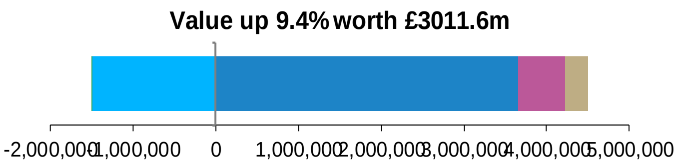
Measure	52 w/e 08 Sep 19	52 w/e 06 Sep 20	Change (Actual)	Change (%)
Spend (£000)	2,892,226	3,059,883	+167,657	+5.8%
Volume (000 kg)	304,560	315,950	+11,390	+3.7%
Penetration (%)	95.24	95.20	-0.04	-0.0%
Frequency	24.24	24.34	+0.11	+0.4%
Spend per Buyer (£)	109.49	114.84	+5.35	+4.9%
Volume per Buyer (kg)	11.53	11.86	+0.33	+2.8%
Spend per Trip (£)	4.52	4.72	+0.20	+4.4%
Volume per Trip (kg)	0.48	0.49	+0.01	+2.4%
Price per kg (£)	9.50	9.68	+0.19	+2.0%

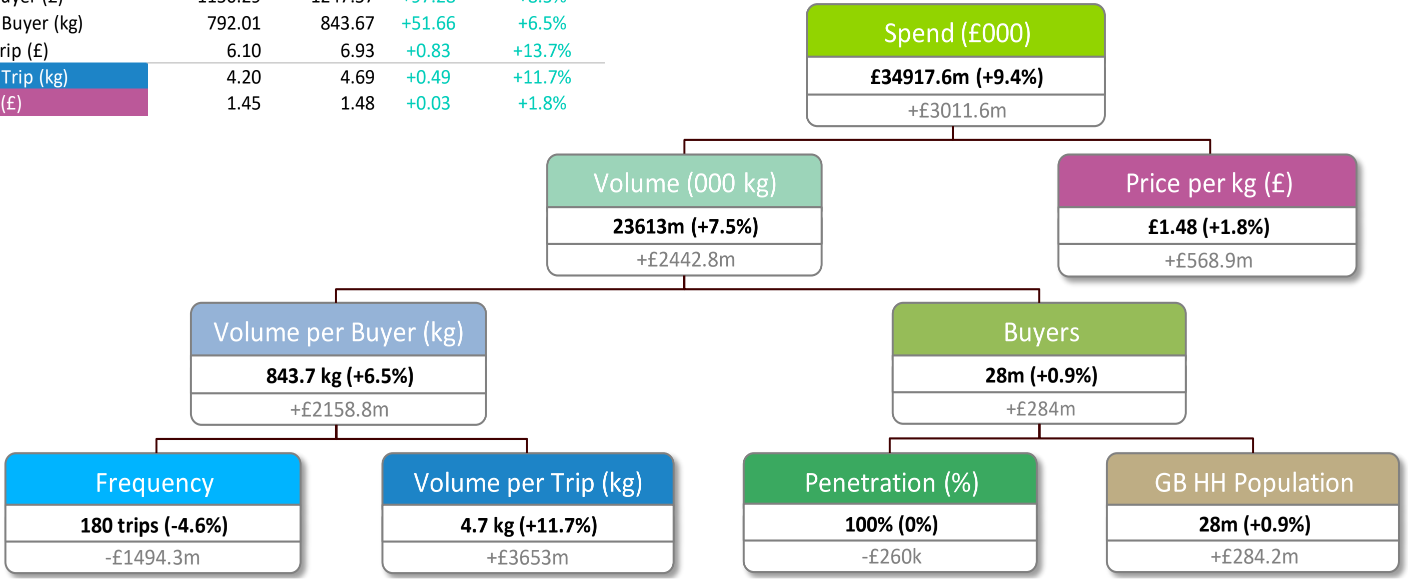




The Total Ambient Groceries market valued at £35b is up +9.4% as shoppers are putting more volume into their baskets.

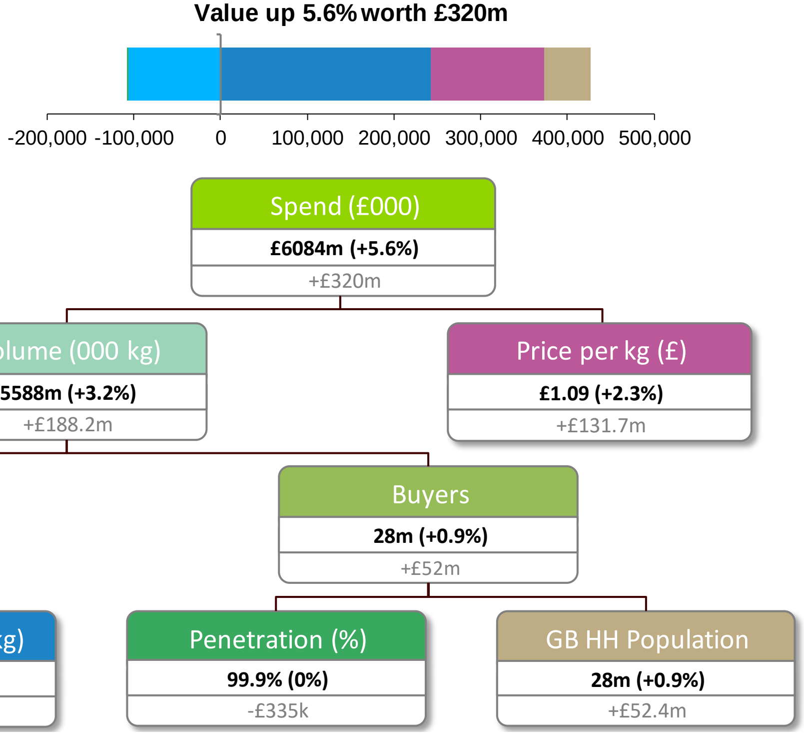
Measure	52 w/e 08 Sep 19	52 w/e 06 Sep 20	Change (Actual)	Change (%)
Spend (£000)	31,906,010	34,917,630	+3,011,620	+9.4%
Volume (000 kg)	21,968,120	23,612,950	+1,644,830	+7.5%
Penetration (%)	100.00	100.00	-0.00	-0.0%
Frequency	188.68	180.00	-8.68	-4.6%
Spend per Buyer (£)	1150.29	1247.57	+97.28	+8.5%
Volume per Buyer (kg)	792.01	843.67	+51.66	+6.5%
Spend per Trip (£)	6.10	6.93	+0.83	+13.7%
Volume per Trip (kg)	4.20	4.69	+0.49	+11.7%
Price per kg (£)	1.45	1.48	+0.03	+1.8%





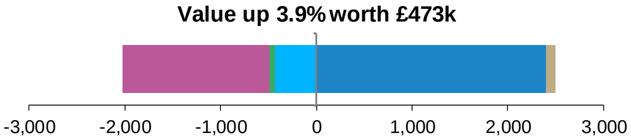
The total ambient bakery market grows at +5.6% driven through extra volume per trip and price inflation.

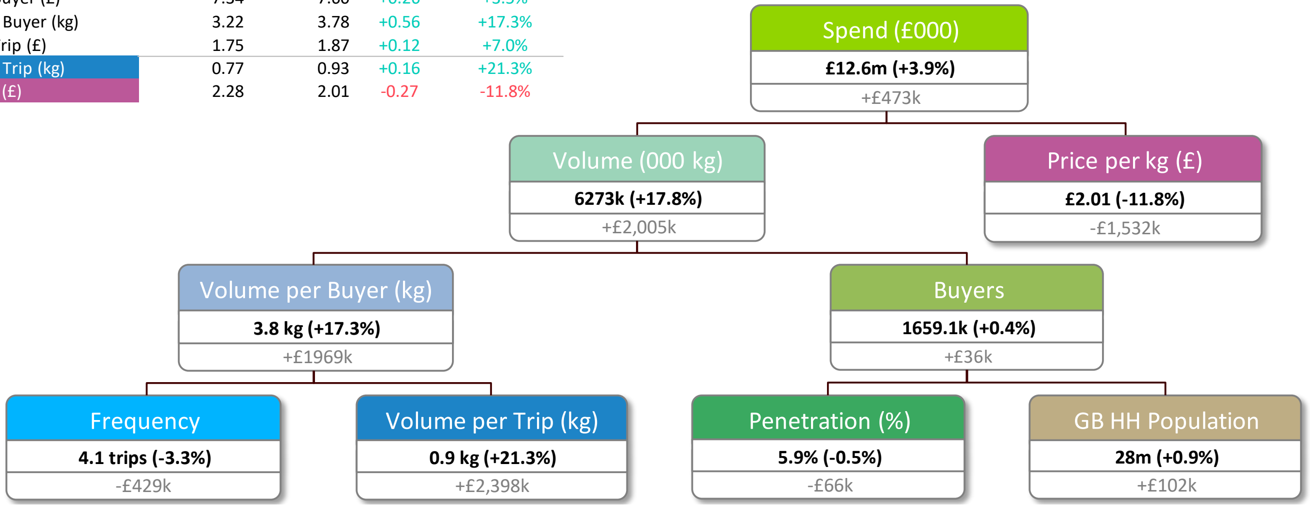
Measure	52 w/e 08 Sep 19	52 w/e 06 Sep 20	Change (Actual)	Change (%)
Spend (£000)	5,764,073	6,084,038	+319,965	+5.6%
Volume (000 kg)	5,414,899	5,588,012	+173,113	+3.2%
Penetration (%)	99.93	99.92	-0.01	-0.0%
Frequency	103.12	101.22	-1.90	-1.8%
Spend per Buyer (£)	207.96	217.54	+9.58	+4.6%
Volume per Buyer (kg)	195.36	199.80	+4.45	+2.3%
Spend per Trip (£)	2.02	2.15	+0.13	+6.6%
Volume per Trip (kg)	1.89	1.97	+0.08	+4.2%
Price per kg (£)	1.06	1.09	+0.02	+2.3%



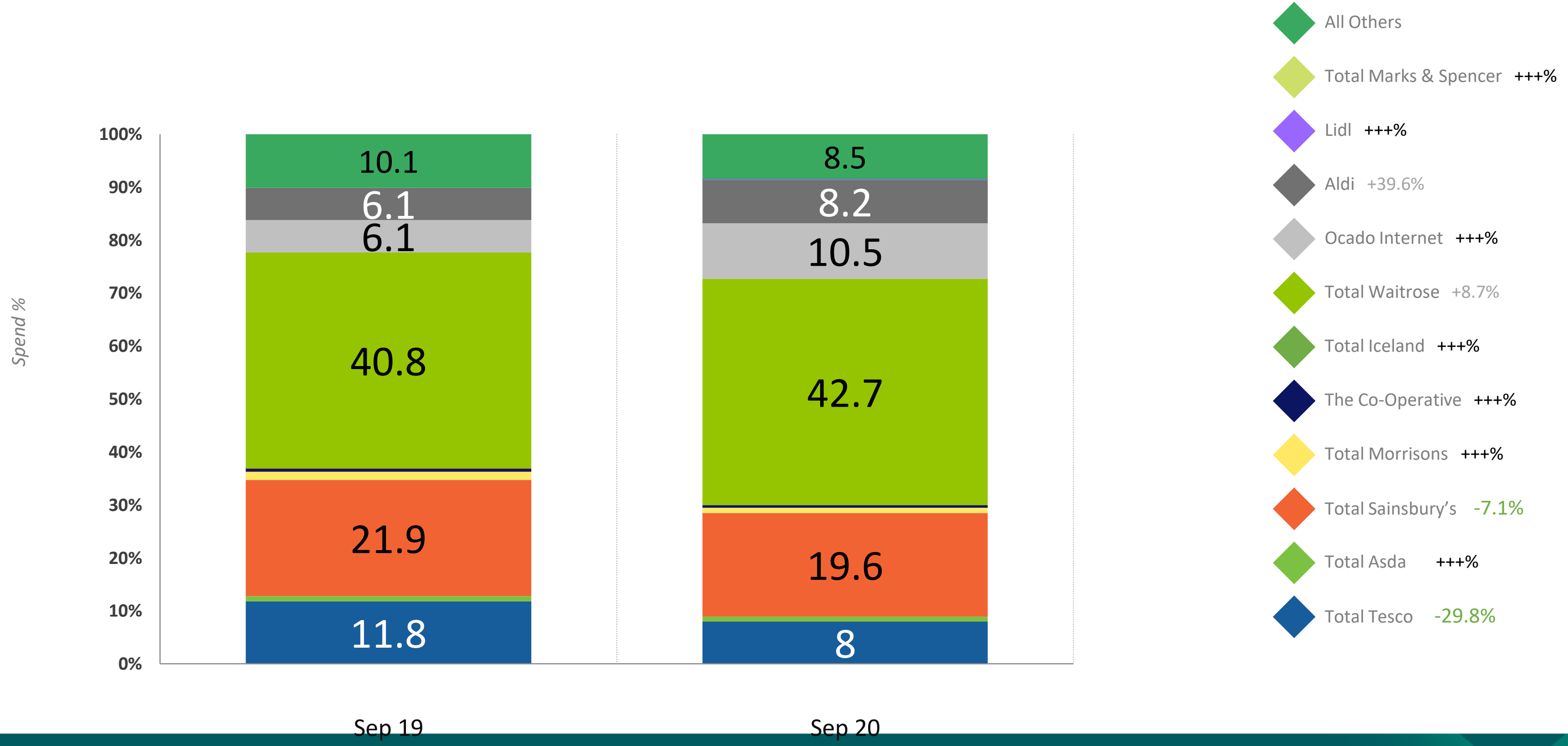
The total organic ambient bakery market grows behind the ambient bakery market at +3.9% and despite larger basket sizes driving growth, this is held back by price declines and less frequent trips.

Measure	52 w/e 08 Sep 19	52 w/e 06 Sep 20	Change (Actual)	Change (%)
Spend (£000)	12,130	12,603	+473	+3.9%
Volume (000 kg)	5,327	6,273	+946	+17.8%
Penetration (%)	5.96	5.93	-0.03	-0.5%
Frequency	4.20	4.06	-0.14	-3.3%
Spend per Buyer (£)	7.34	7.60	+0.26	+3.5%
Volume per Buyer (kg)	3.22	3.78	+0.56	+17.3%
Spend per Trip (£)	1.75	1.87	+0.12	+7.0%
Volume per Trip (kg)	0.77	0.93	+0.16	+21.3%
Price per kg (£)	2.28	2.01	-0.27	-11.8%

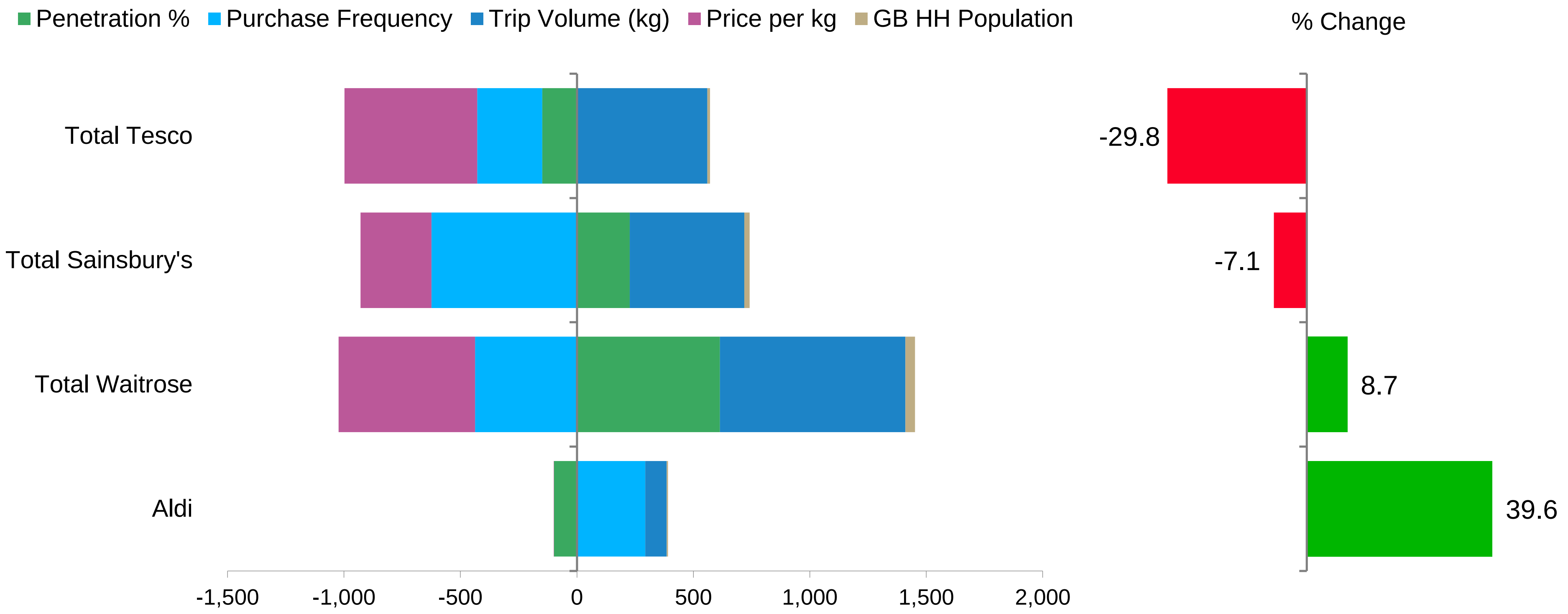




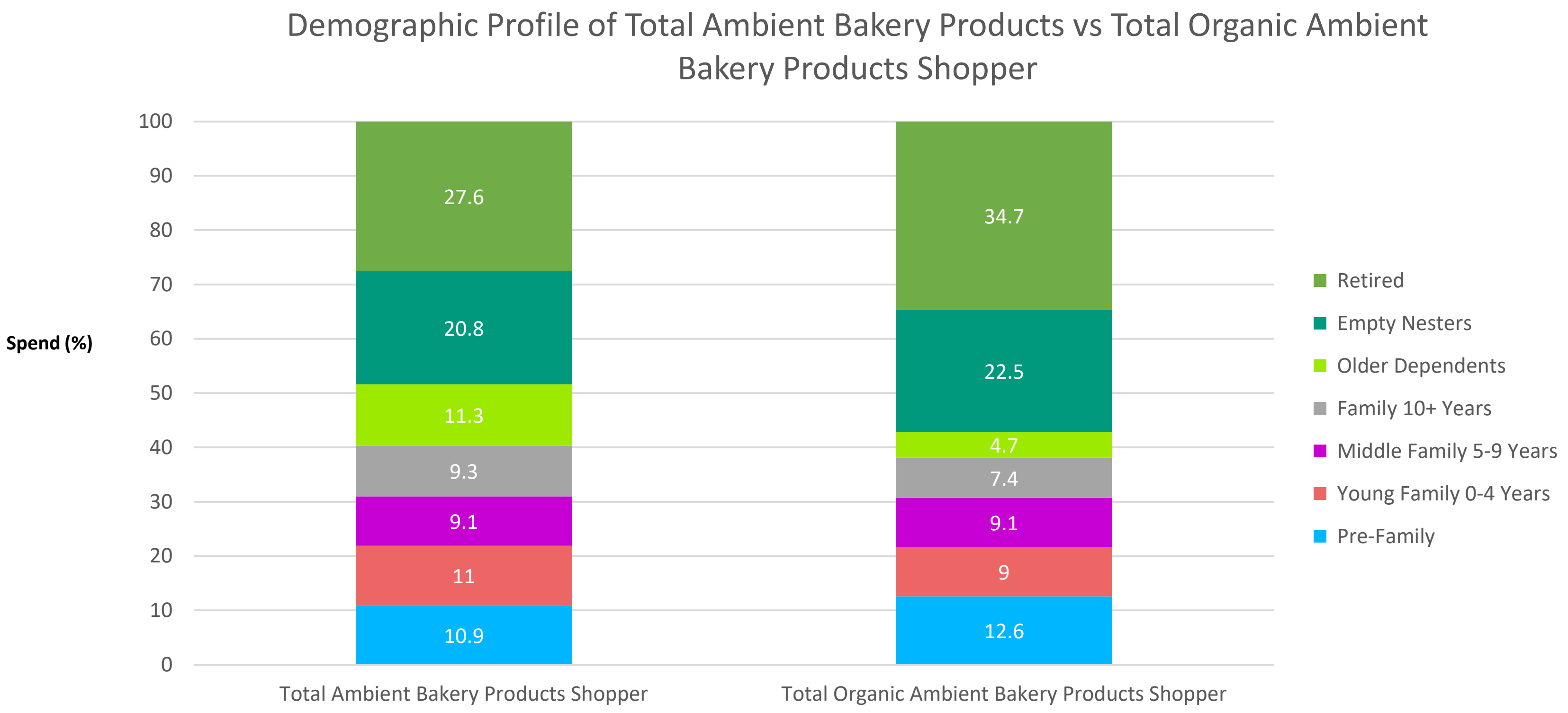
From a retailer perspective, Waitrose dominate the market and boost their share by nearly 2%pts, whilst Aldi see strong growth at +39.6%.



Whilst Tesco and Sainsbury's decline is driven through shoppers purchasing into the category less frequently and the average price declining.



Unsurprisingly, the organic shopper is likely to be retired, with over 1/3rd of all spend on organic bakery products coming through those who are retired



Market Value

Source: www.europarl.europa.eu/news 12/10/2020

Consumer Attitudes around Organic

Consumer attitudes to Organic are in line with their evolving needs